

City of Sugar Land Resident Survey

PRESENTED BY  ETC
INSTITUTE



Background

1st Resident Satisfaction Survey conducted in 1998

Since 2004, surveys are conducted every 2-3 years

Summer 2015 - surveyed other cities' current practices, technology and companies

Identified 6 nationally-recognized firms

Chose ETC Institute for 2015 survey based on industry expertise and unique ability to benchmark results against state and nation

ETC Institute administered 2015 and 2017 surveys

Last summer, we again solicited proposals from recognized survey firms to ensure best value.

Background

Contract with ETC approved in June 2020

Survey administered in October and November 2020

- **Covid-19**
- **Economic Hardships/Business Closures/Layoffs**
- **Civil Unrest/Protests/Police Distrust**
- **Presidential Election**
- **Tropical Storm Threats/Regional Flooding**
- **Difficult Budget Decisions**



A National Leader in Market Research for Local Governmental Organizations

More than 2,000,000 Persons Surveyed Since 2009 in more than 900 cities in 49 states

Helping organizations make better decisions

Agenda

Purpose, Methodology, and Demographics

Bottom Line Upfront

Major Findings

Summary

Questions

Purpose

To objectively assess resident satisfaction with the delivery of City services

To measure trends from 2015 and 2017

To help determine priorities for the community as a part of the City's on-going planning process

To compare the City's performance with residents in other communities both regionally and nationally

Methodology

Survey Description

- Seven-page survey (previously 6)
- Third Resident Survey conducted for the City by ETC Institute

Method of Administration

- By mail and online to random sample of households in the City
- Each survey took approximately 15-20 minutes to complete

Sample Size

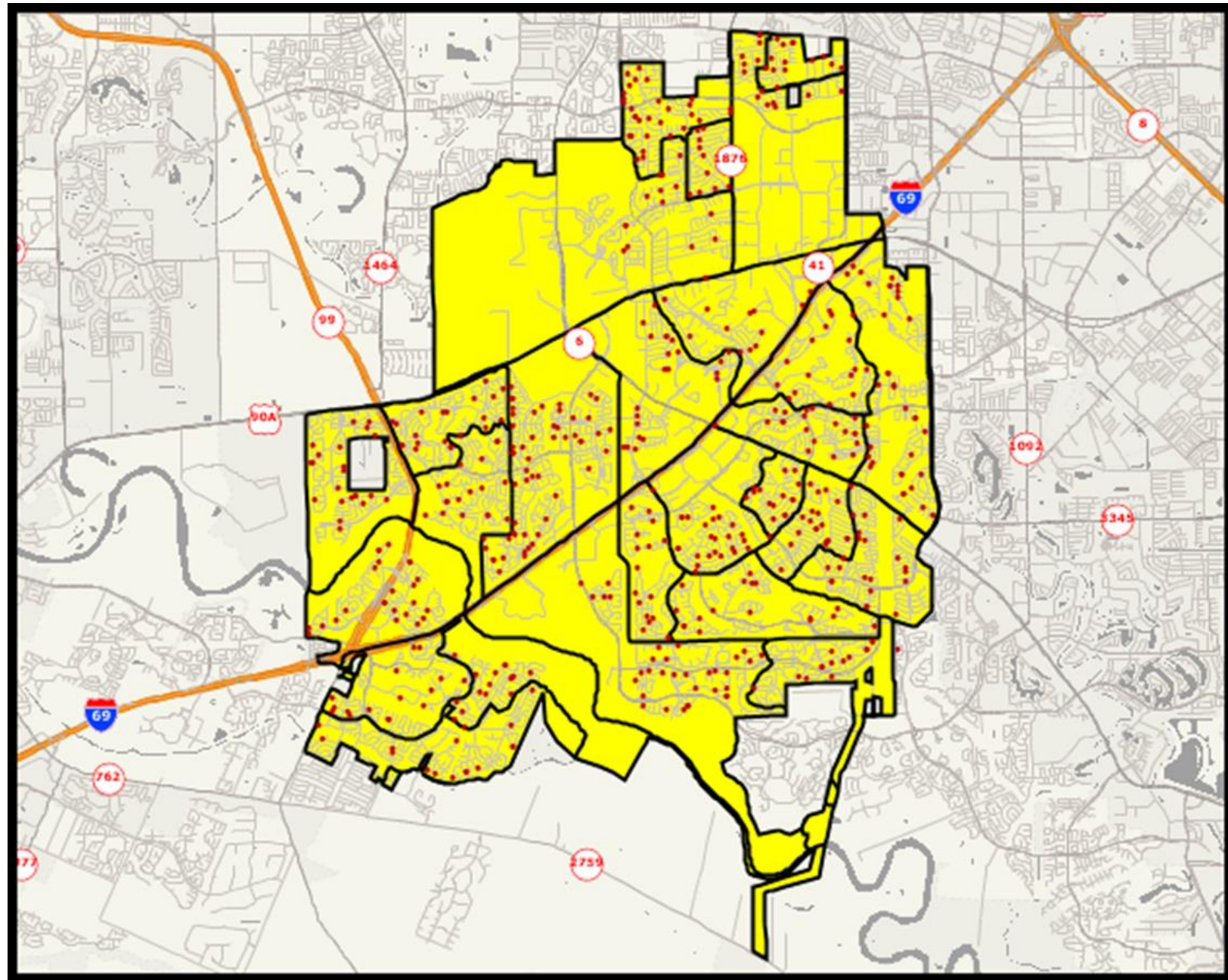
- **Goal:** 500 surveys (*same as 2015 and 2017*)
- **Actual:** 544 surveys (*34 more surveys collected than in 2017*)

Margin of Error

- +/- 4.2% at the 95% level of confidence

Location of Survey Respondents

Good distribution of responses
throughout the City



City of Sugar Land Resident Survey

Bottom Line Up Front

Residents Have a Positive Perception of the City

- 98% rated the City as an “excellent” or “good” place to live
- 97% rated the City as an “excellent” or “good” place to raise children

Sugar Land Continues to Set the Standard for the Delivery of City Services

- The City rated the same as or above the Texas Average in 77 of the 80 areas (96%) that were compared
- The City rated 40% over the Texas average for the value received for City taxes and fees
- The City rated 36% over the Texas average for the overall quality of City government services

Top Priorities for Improvement

- Quality of drainage system in rainfall events
- Flow of traffic and congestion management (same as 2017)

Trends

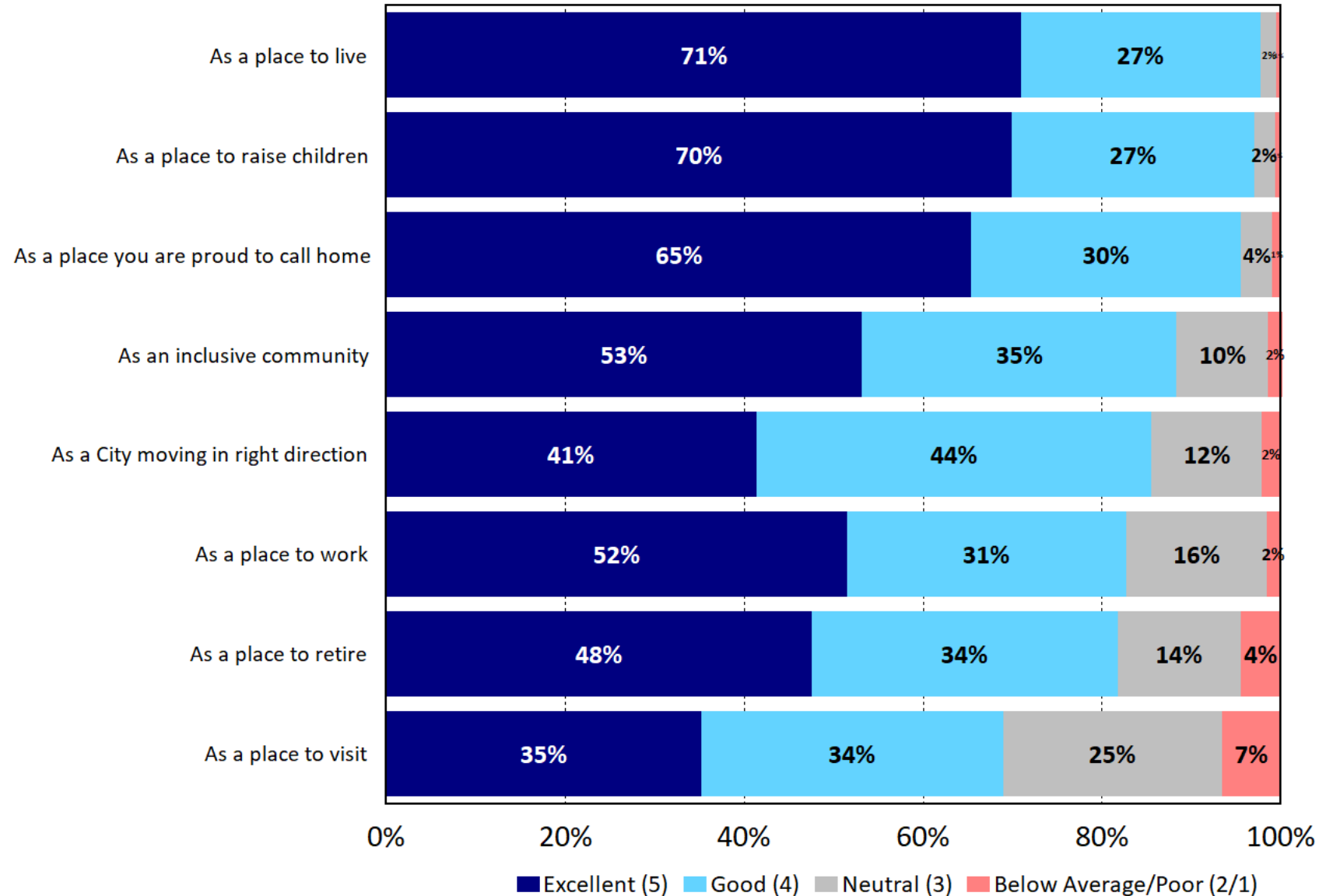
- The City performed very well compared to both 2015 and 2017 results
- Overall satisfaction remains extremely high among residents

Perceptions

RESIDENTS HAVE A VERY POSITIVE PERCEPTION OF THE CITY

Q1. Ratings of Sugar Land with Regard to Each of the Following:

by percentage of households (excluding "don't know")

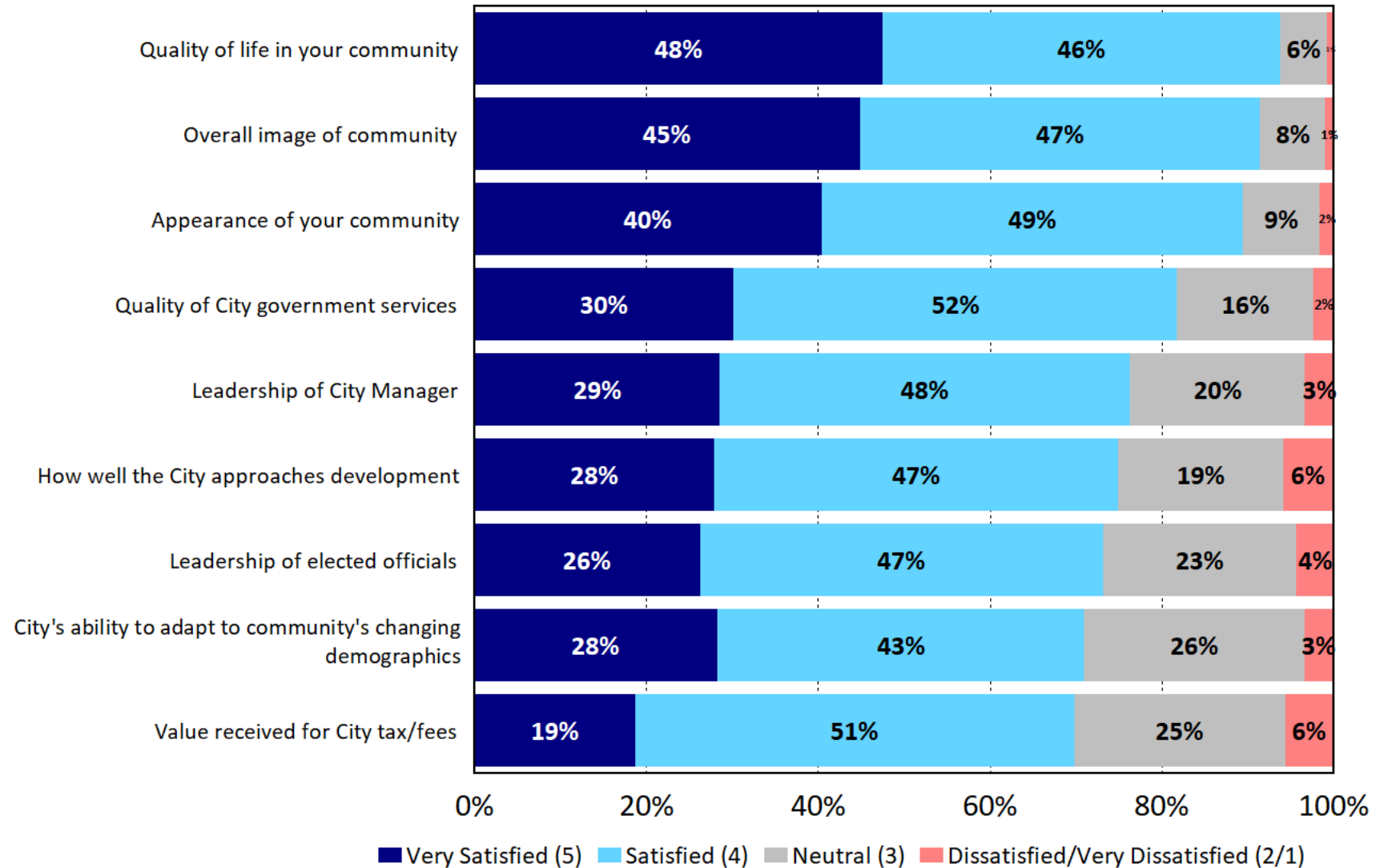


Source: ETC Institute (2020)

Nearly 70% of respondents gave positive ratings to all of the items in this question

Q4. Overall Satisfaction with Items that Influence Perceptions of the Community

by percentage of households (excluding "don't know")

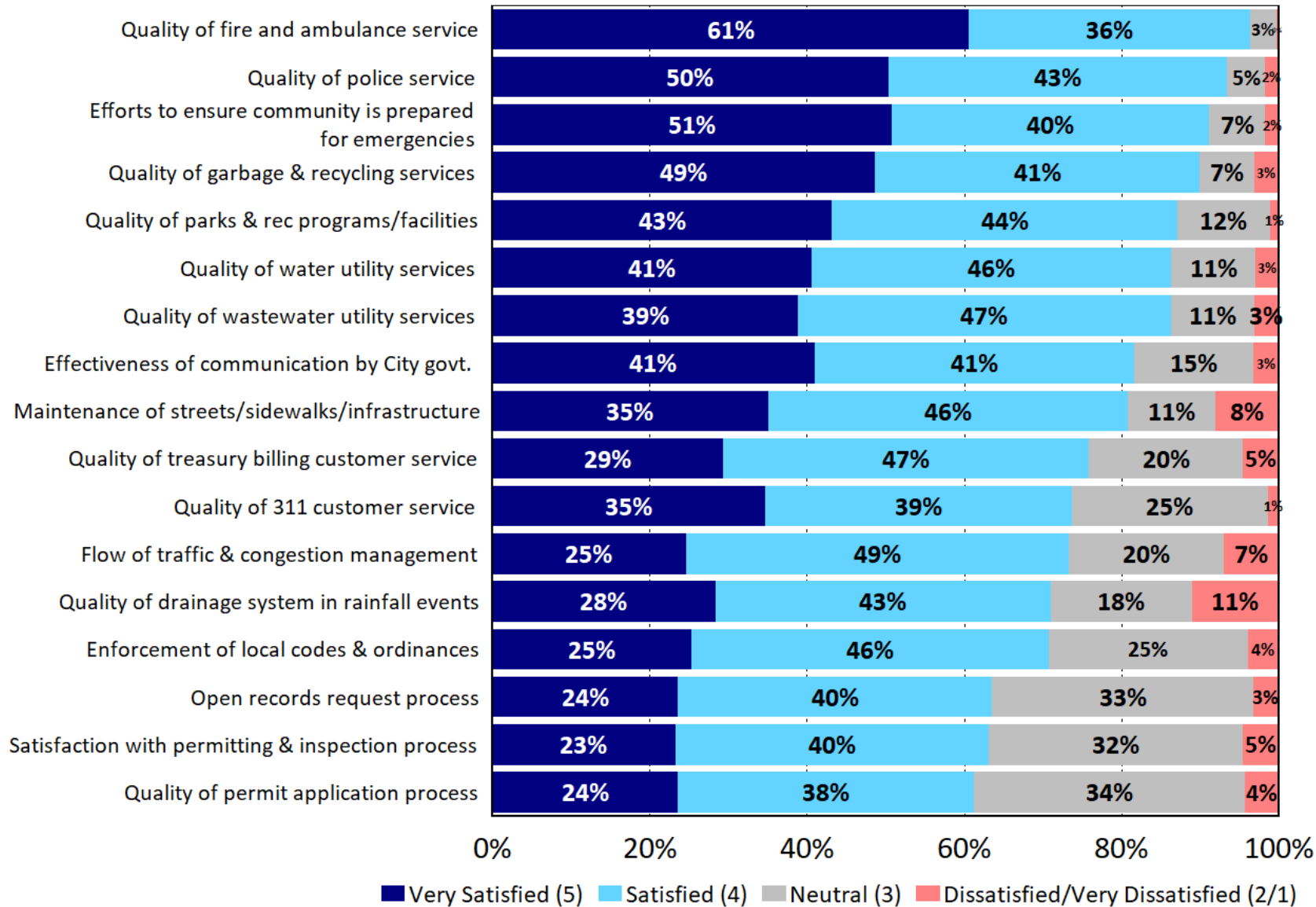


Source: ETC Institute (2020)

Overall, residents have a very positive perception of the City

Q2. Overall Satisfaction with Major Categories of Service

by percentage of households (excluding "don't know")



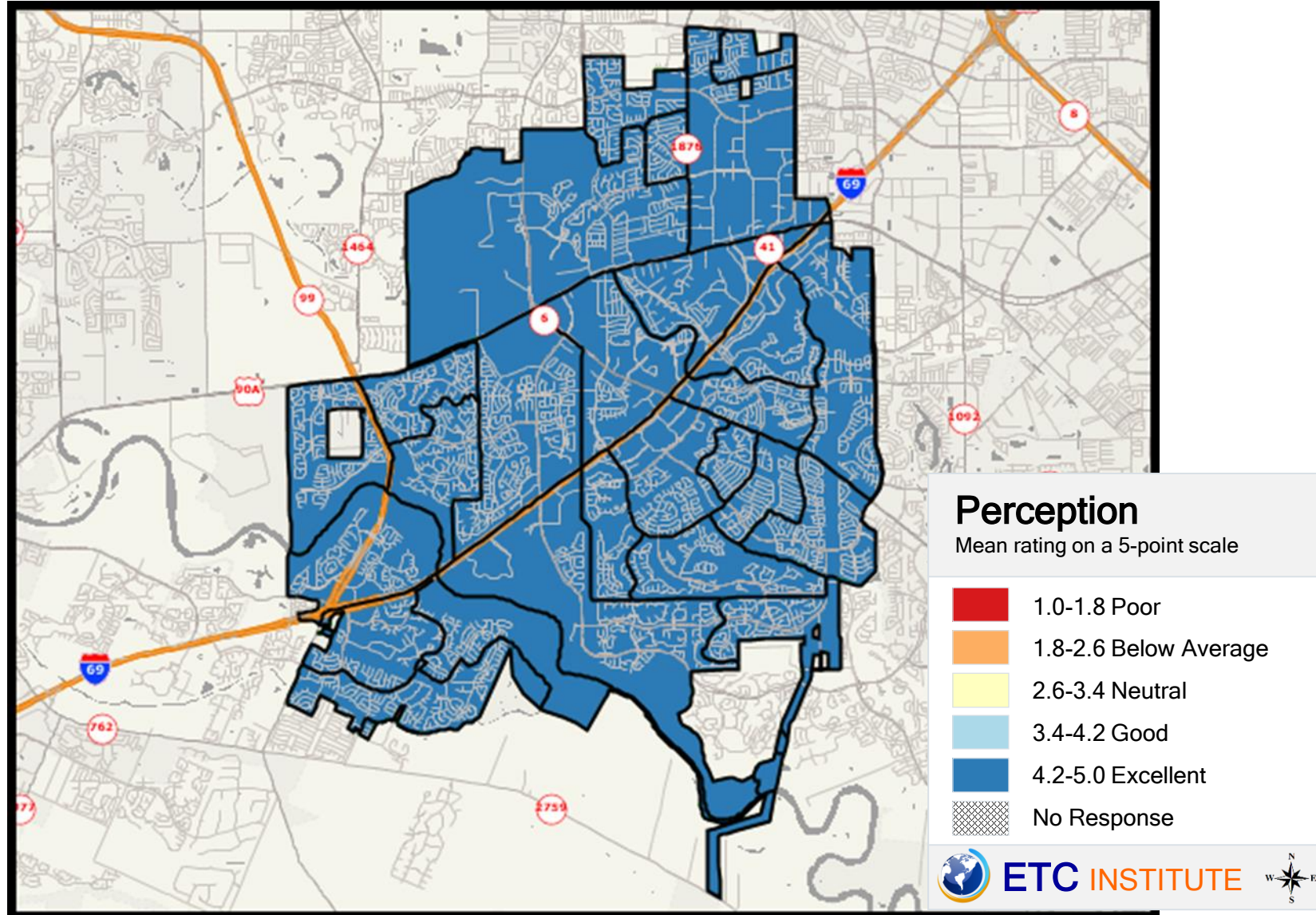
Source: ETC Institute (2020)

Nearly 70% of Residents Were Satisfied with 6 of the 12 Services Rated

Rating Sugar Land as a Place to Live

All areas of the map are in blue

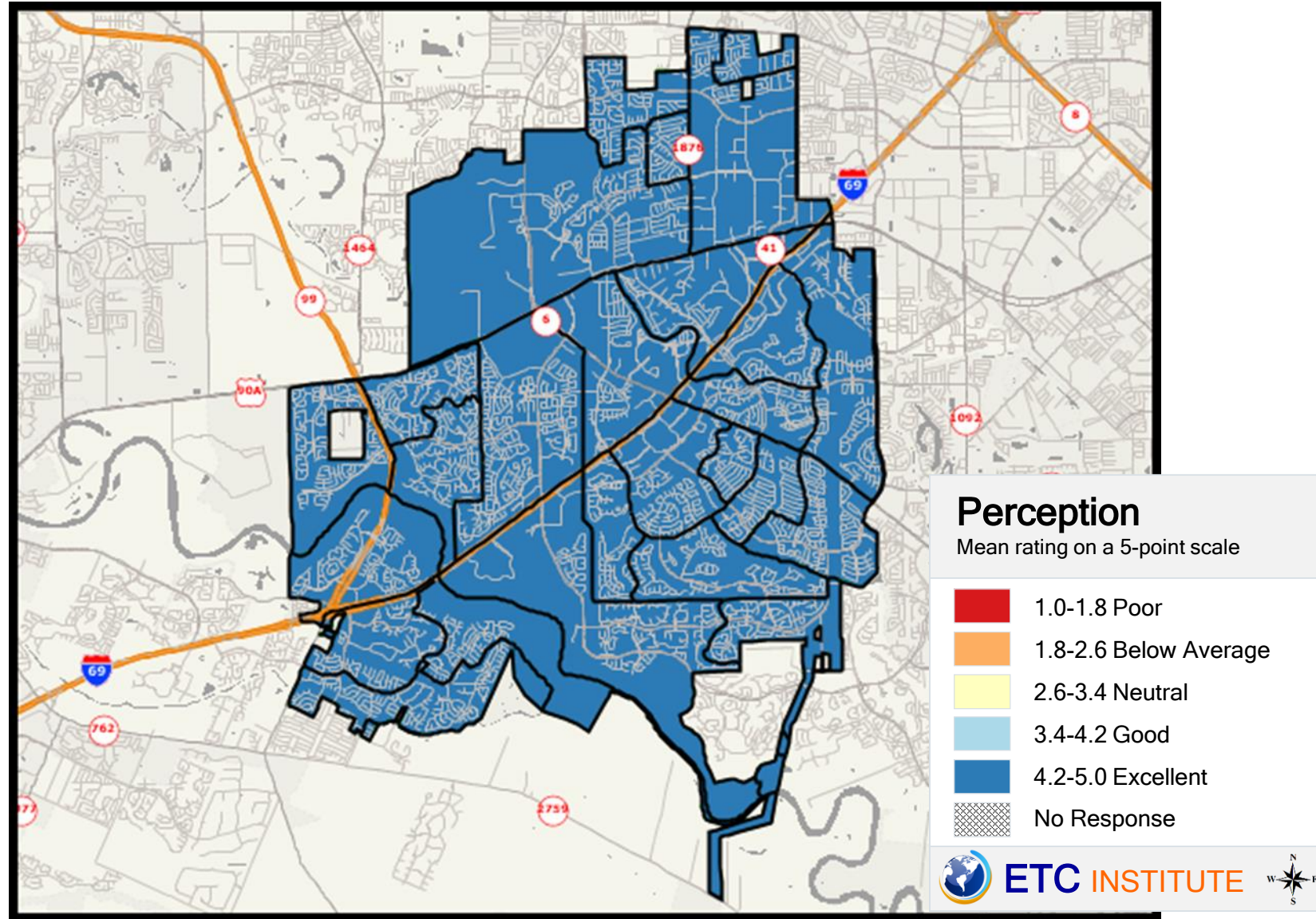
Areas of yellow, orange, or red should receive additional focus.



Rating Sugar Land as a Place you are Proud to Call Home

All areas of the map are in blue

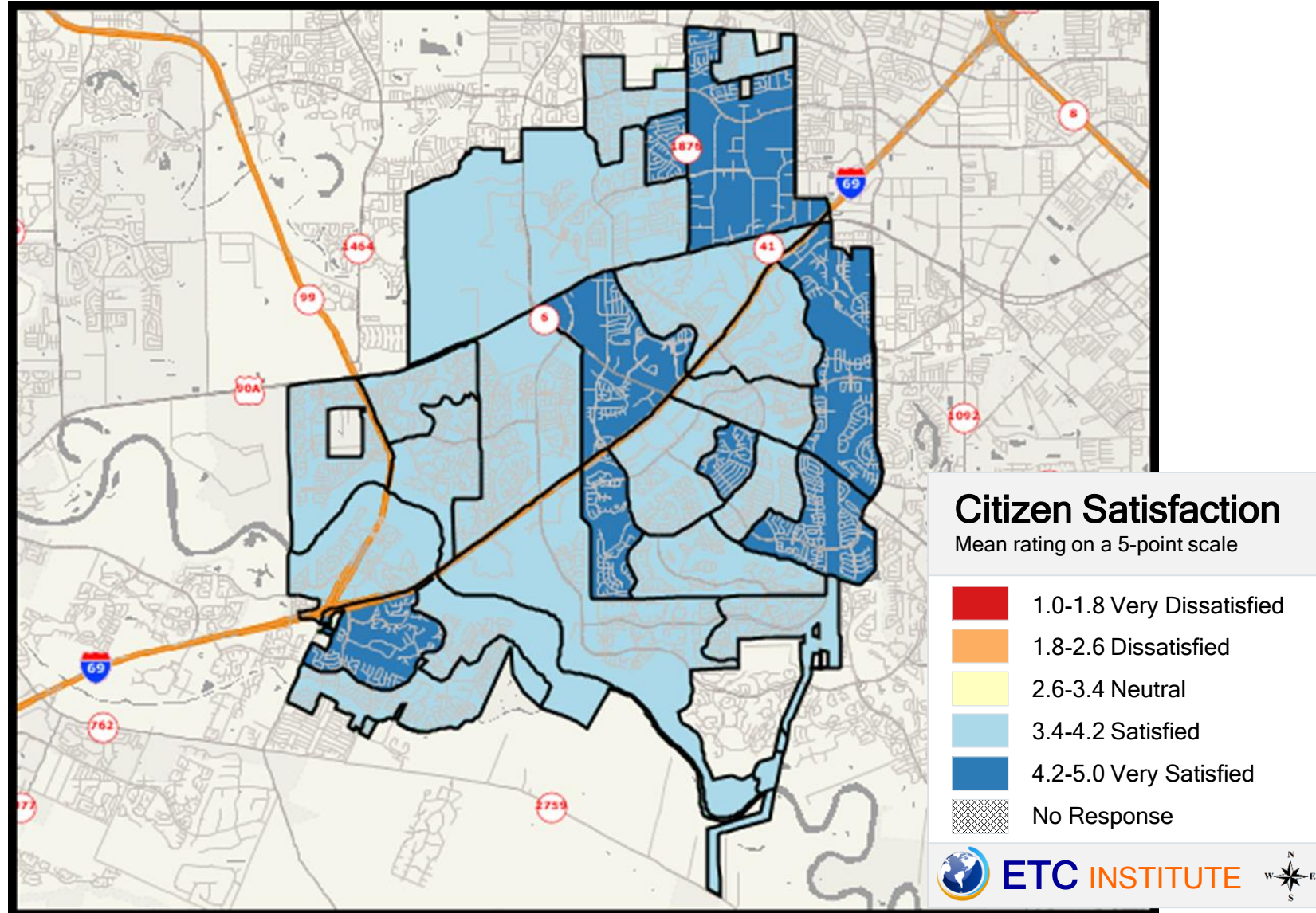
Areas of yellow, orange, or red should receive additional focus.



Overall Quality of City Government Services

All areas of the map are in blue

The City is equitably providing services to all residents regardless of their location

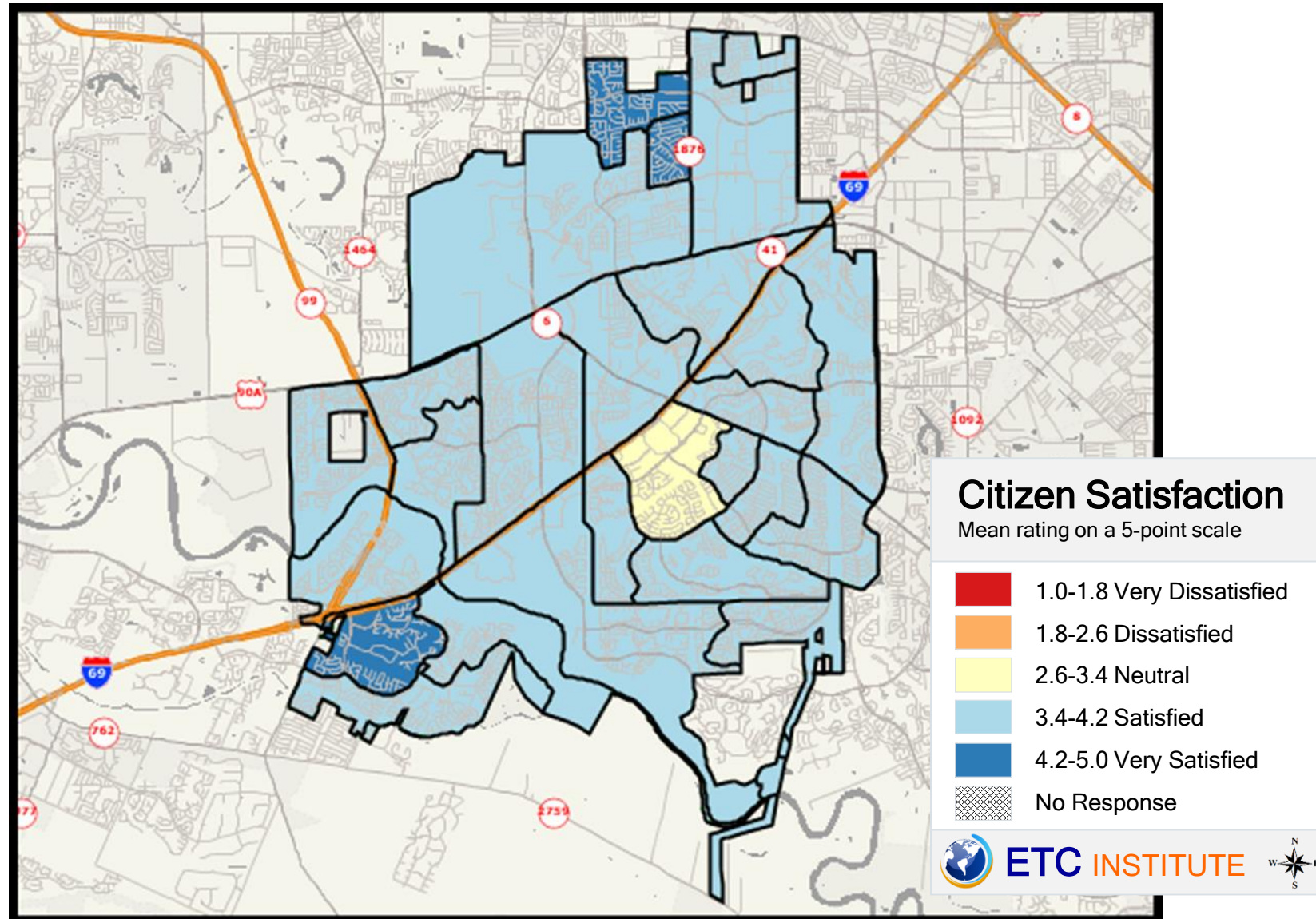


Overall Quality of Drainage System in Rainfall Events

This item was determined to be the top priority for improvement based on the Importance-Satisfaction Analysis

Areas in yellow show lower levels of satisfaction and can help the City target resources to those areas with the most need for improvement

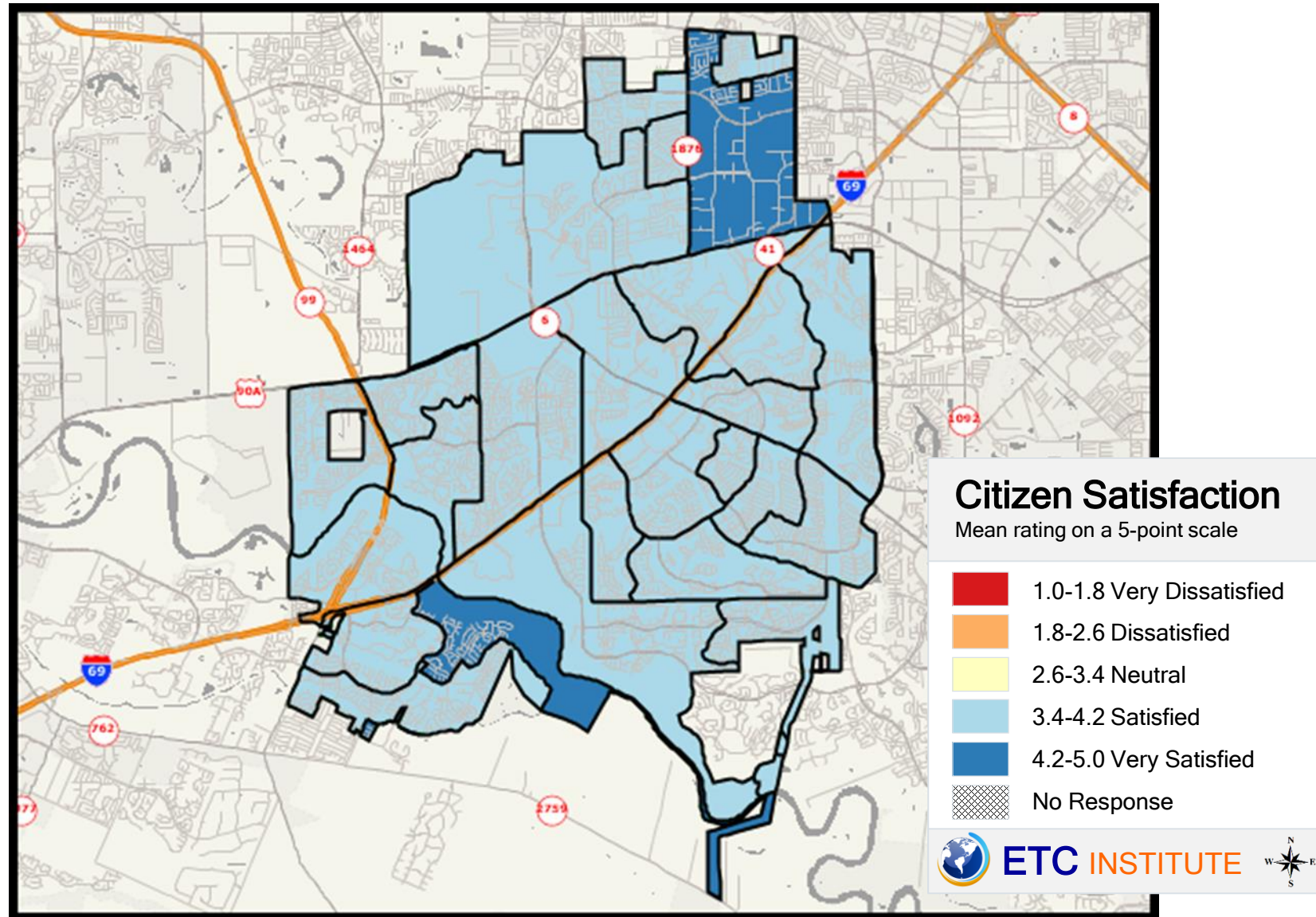
Areas in blue indicate higher levels of satisfaction



Overall Flow of Traffic and Congestion Management

This item was determined to be the second highest priority for improvement based on the Importance-Satisfaction Analysis

Although no areas are yellow or orange the importance of this item tells us it should remain a top priority for improvement



Benchmarks

SUGAR LAND RATES SIGNIFICANTLY HIGHER THAN LOCAL AND NATIONAL AVERAGES IN MANY KEY PERFORMANCE AREAS

Benchmarks

The results of the 2020 City of Sugar Land Resident survey were compared to three sources to help the City gauge their overall performance in many key areas.

- A national survey administered by ETC Institute in the summer of 2019
- A Texas survey administered by ETC Institute in the summer of 2019
- Individual community surveys that were administered in 17 Texas cities over the past 2 years

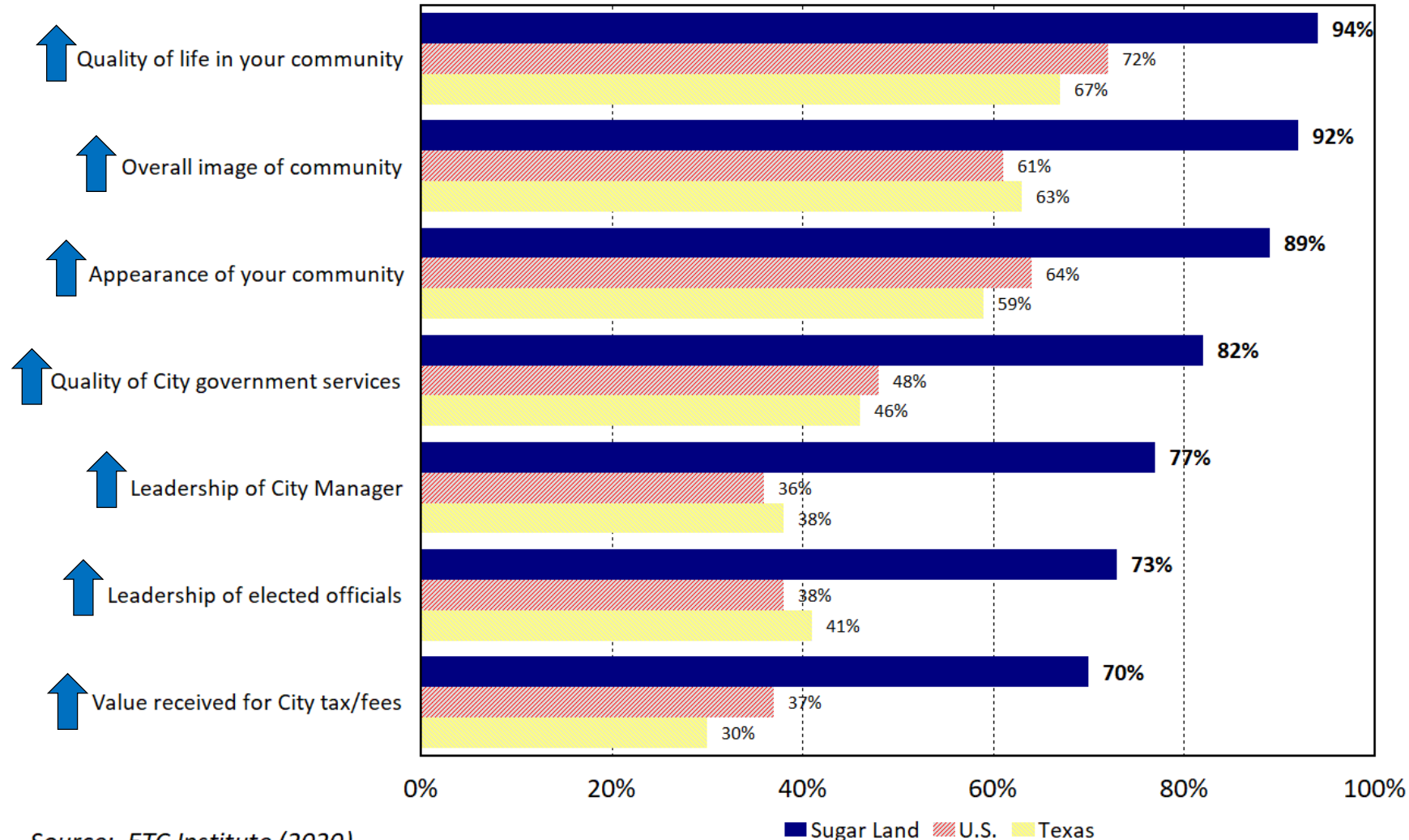
ETC Institute provided state, national, and performance range benchmarks

- Performance range benchmarks show how Sugar Land compares to communities who administer similar surveys
- The charts show the lowest and highest satisfaction ratings on the left and right of each bar
- The orange dot shows how Sugar Land compares to the range of results from the 17 Texas cities

Perceptions of the Community

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



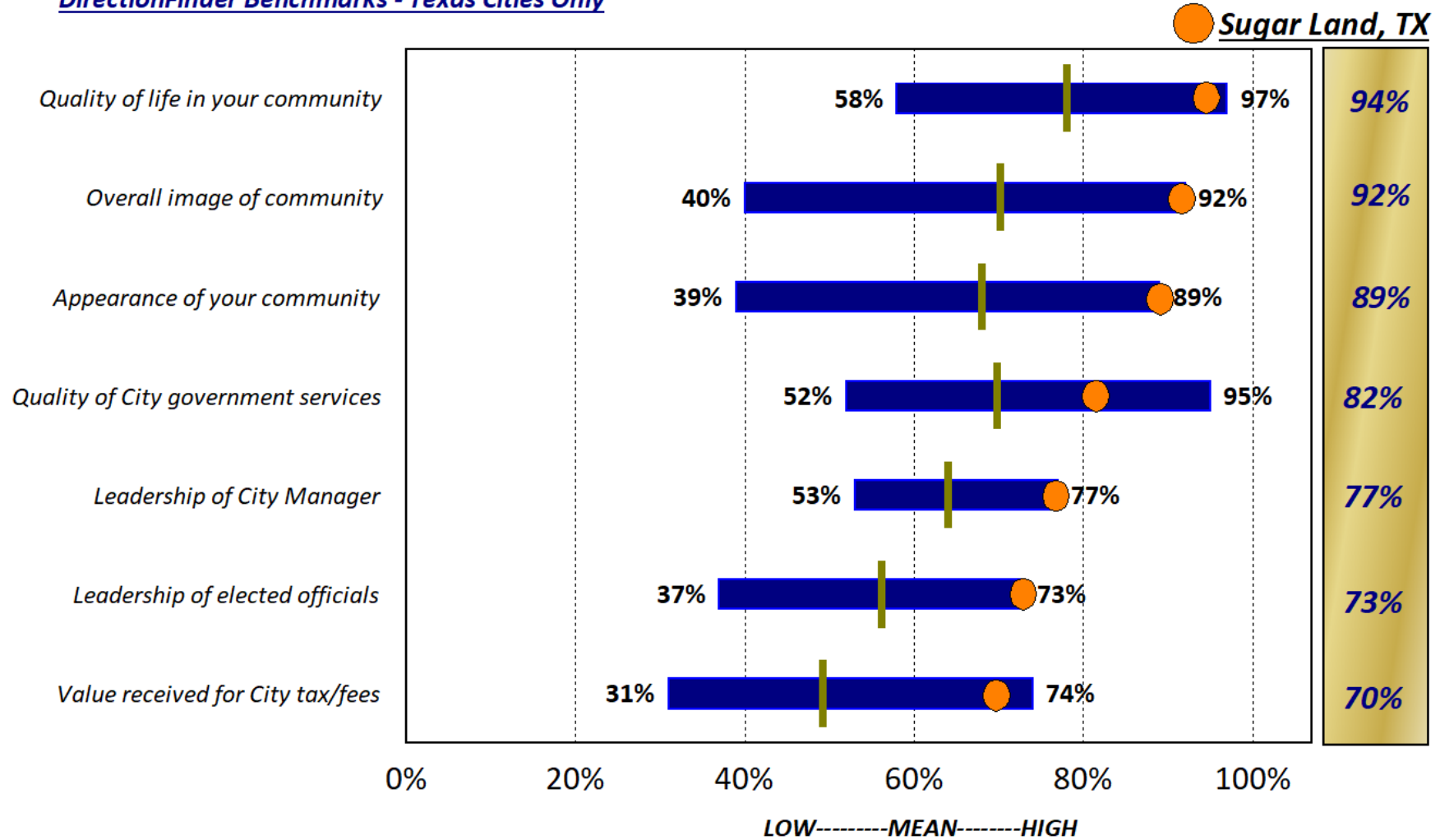
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Perceptions of the Community

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



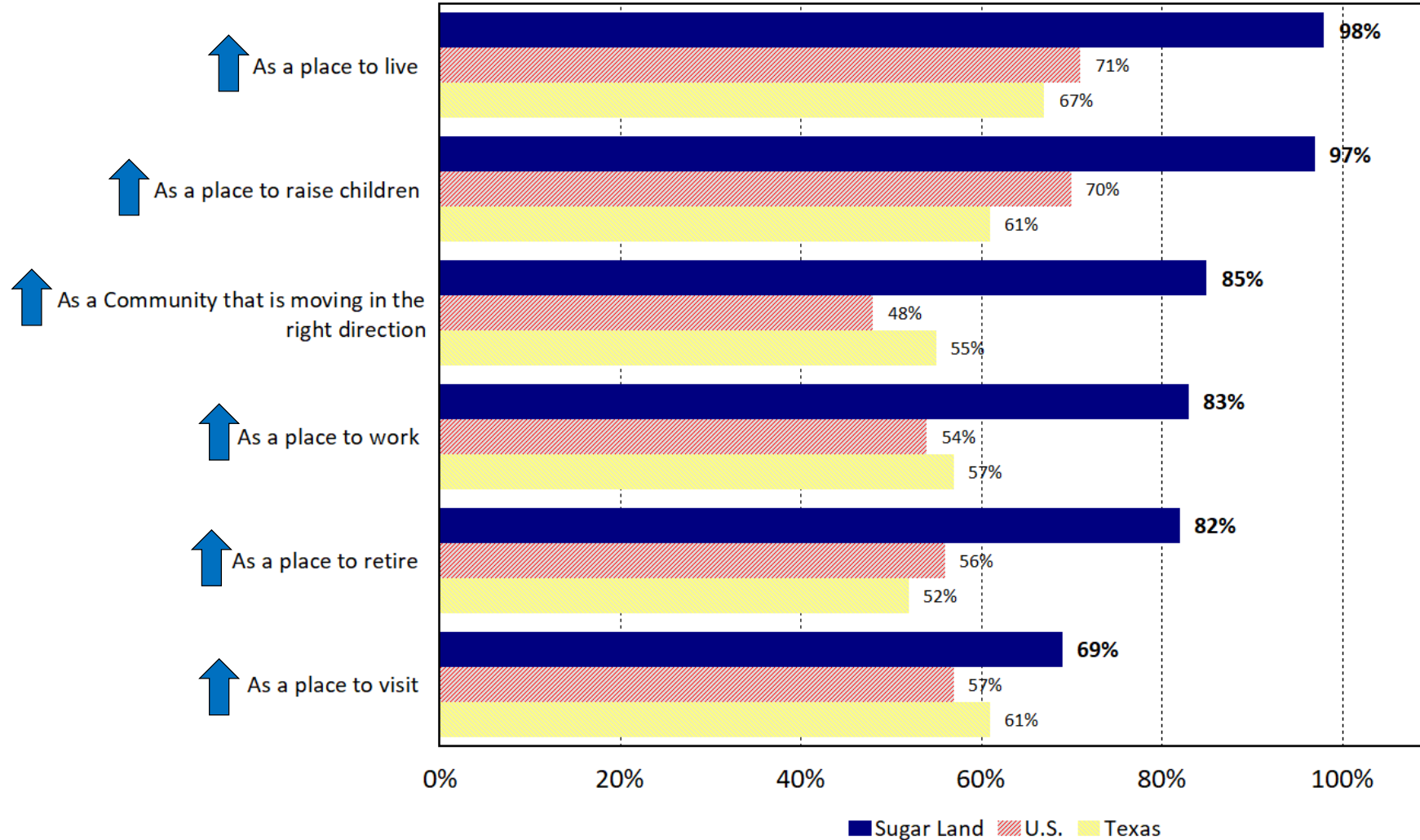
Source: ETC Institute (2020)

Sugar Land received the top rating in 4 of the 7 areas assessed

Rating the Community as a Whole

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "excellent"



Source: ETC Institute (2020)

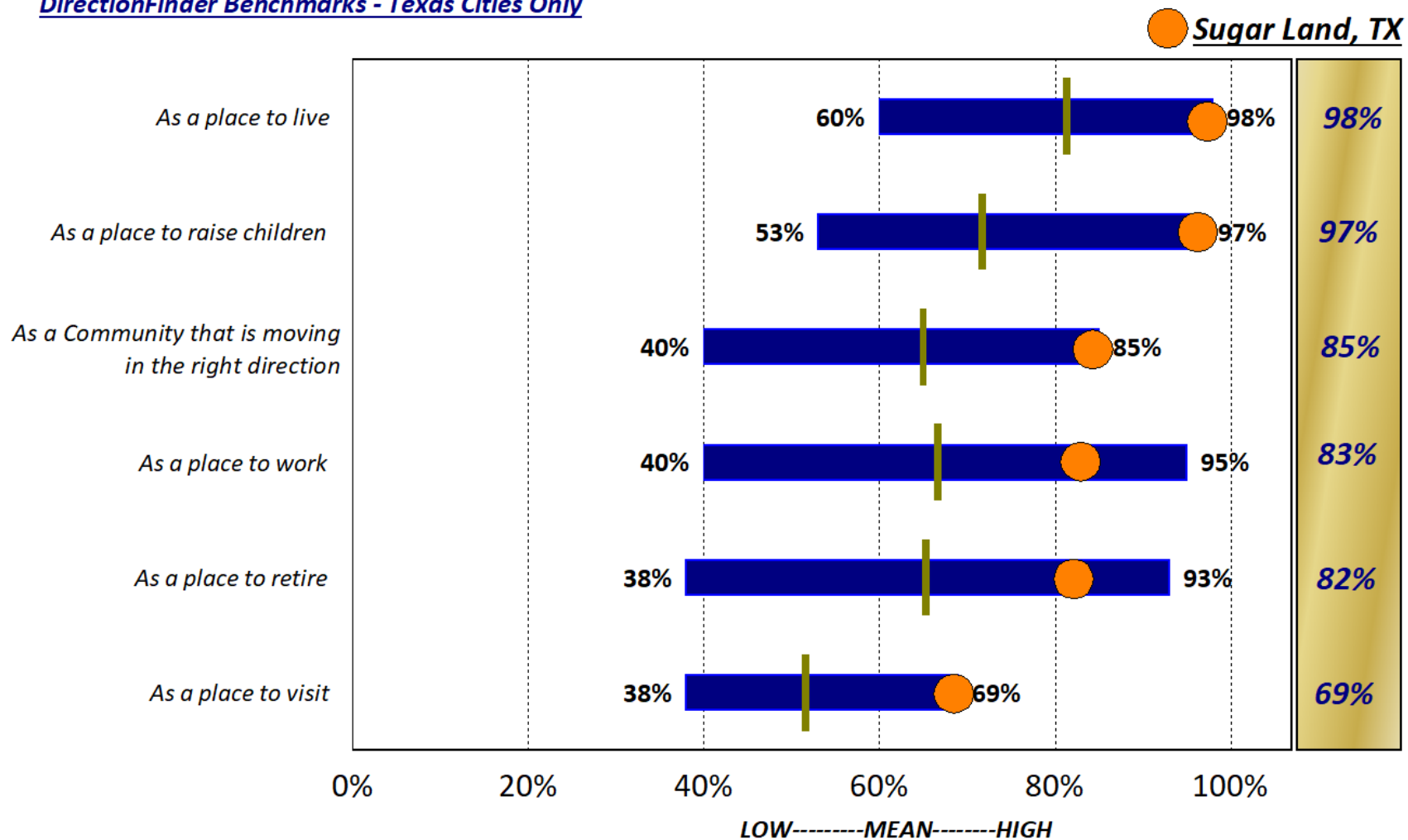
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Rating the Community as a Whole

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "excellent"

DirectionFinder Benchmarks - Texas Cities Only



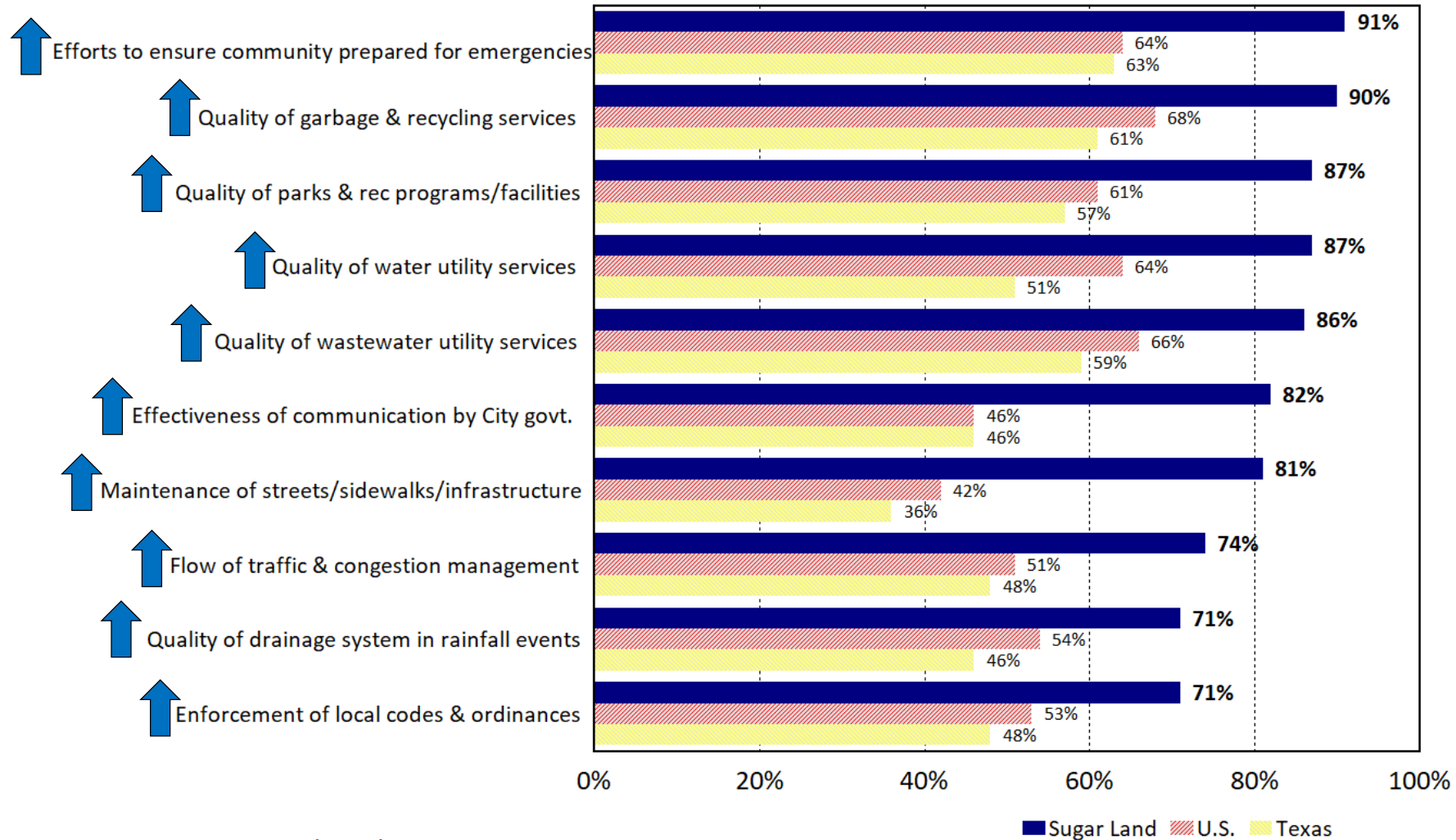
Source: ETC Institute (2020)

Sugar Land received the top rating in 4 of the 6 areas assessed

Major Categories of Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

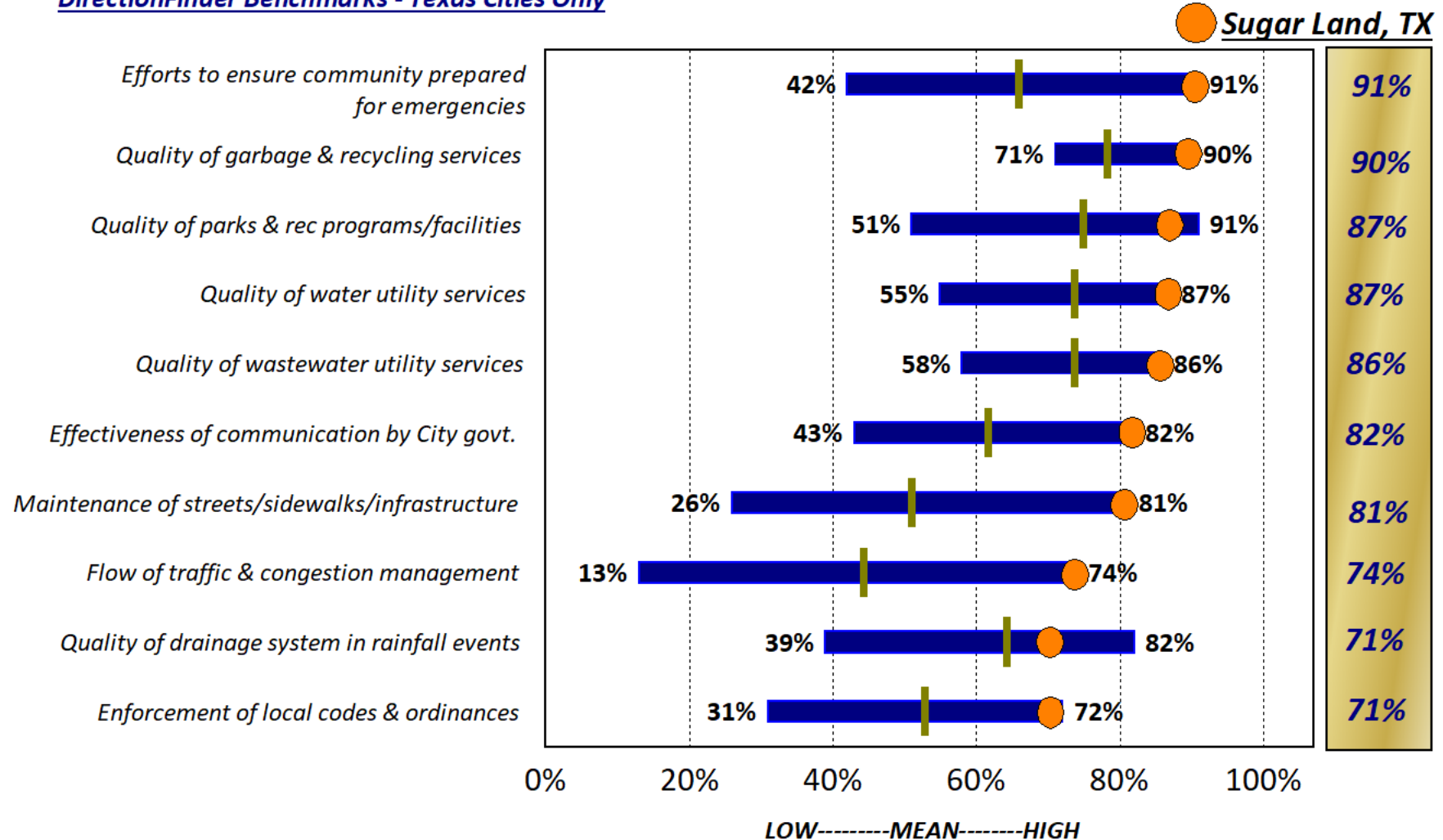
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Major Categories of Services

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



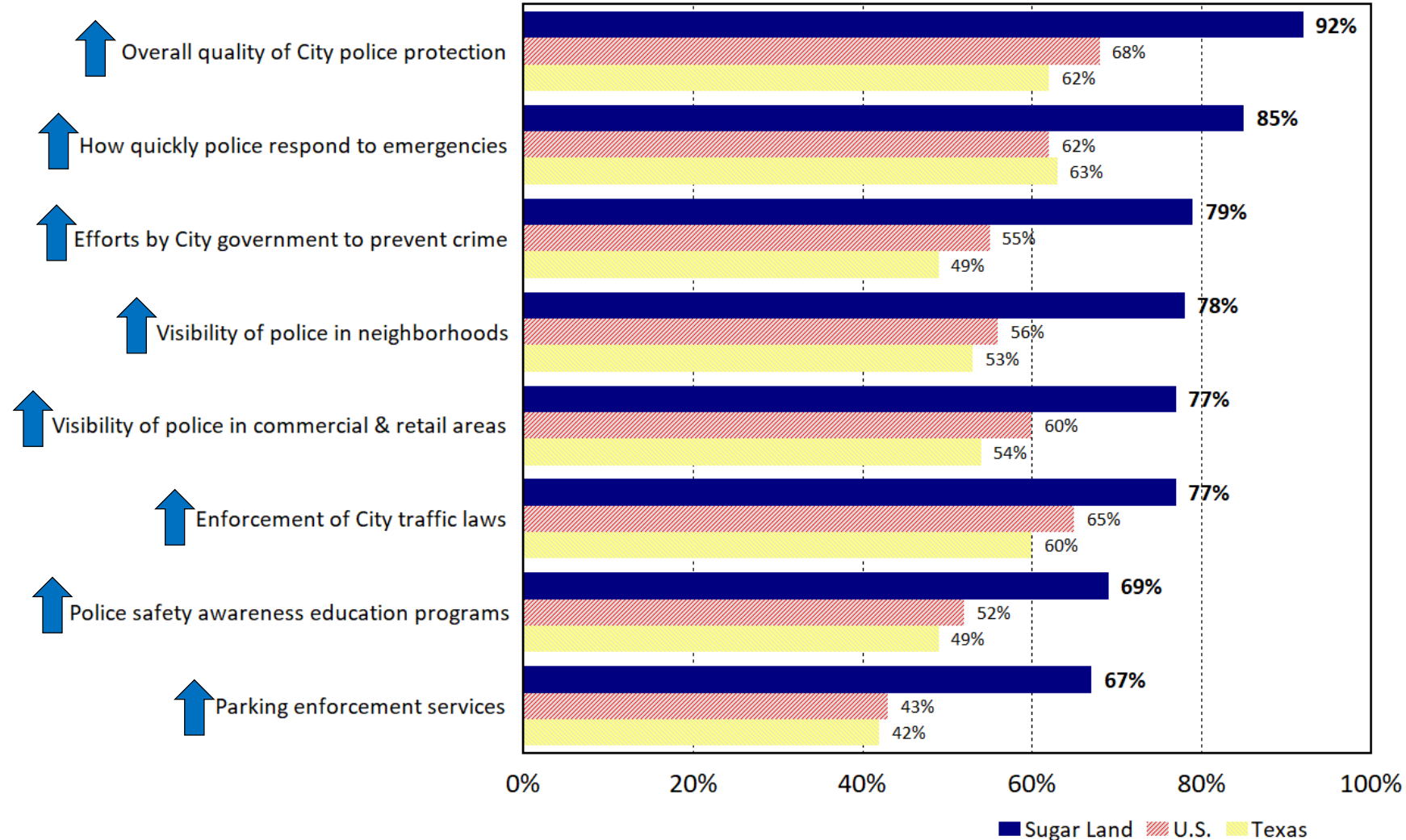
Source: ETC Institute (2020)

Sugar Land received the top rating in 7 of the 10 areas assessed

Public Safety Service - Police Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

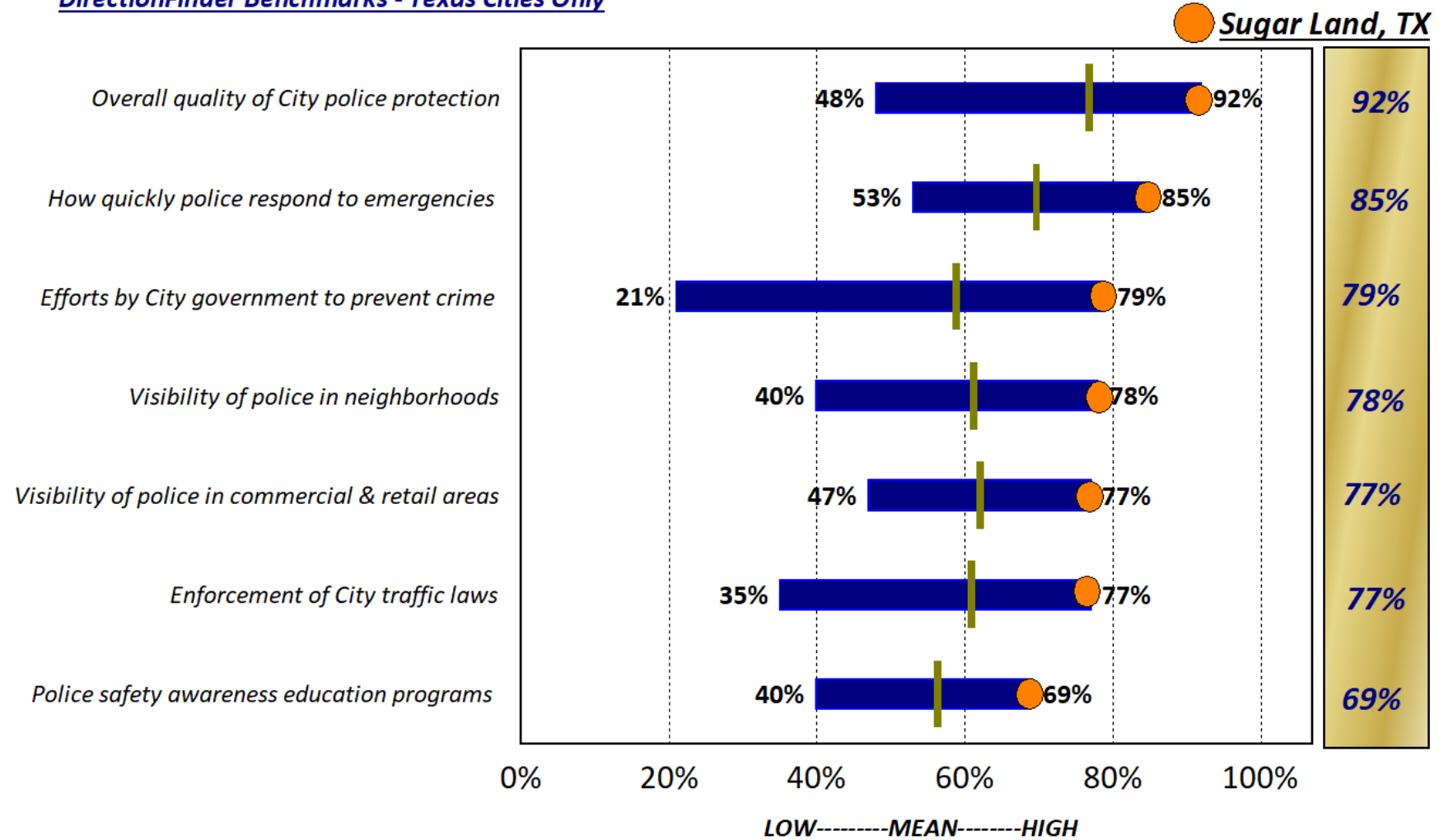
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Public Safety Services - Police Service

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



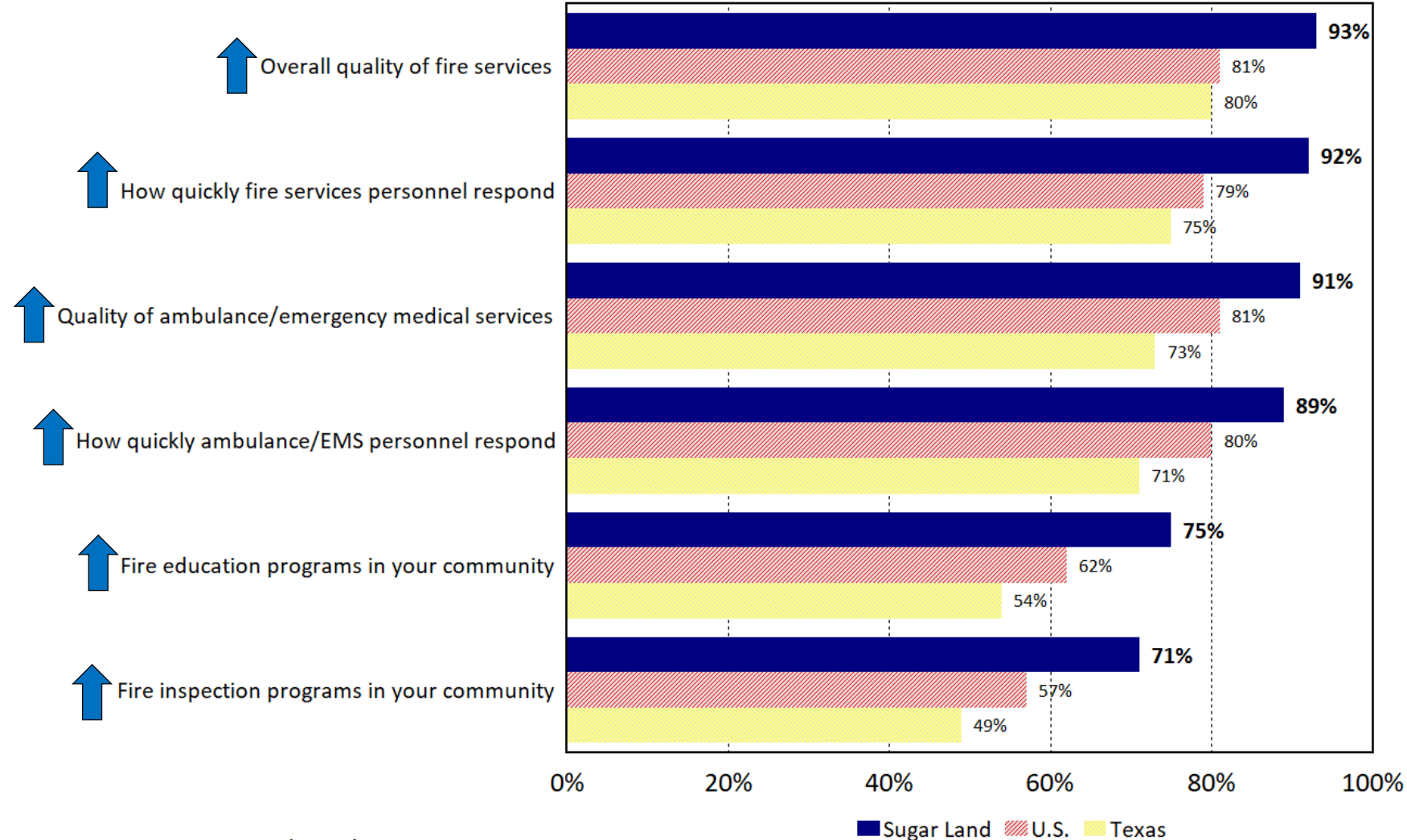
Source: ETC Institute (2020)

Sugar Land received the top rating in in ALL 7 areas assessed

Public Safety Service - Fire Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

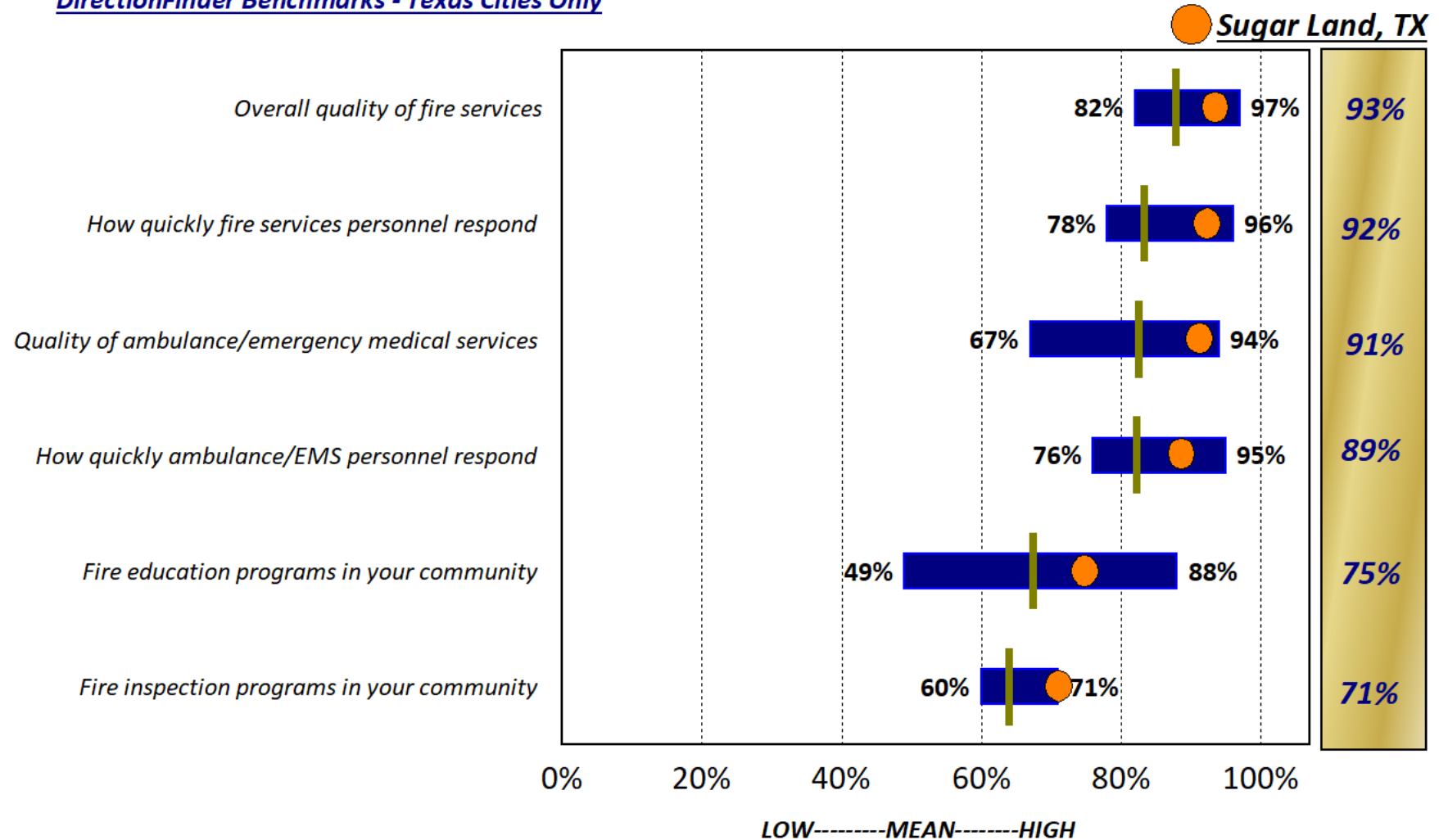
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Public Safety Services - Fire Service

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



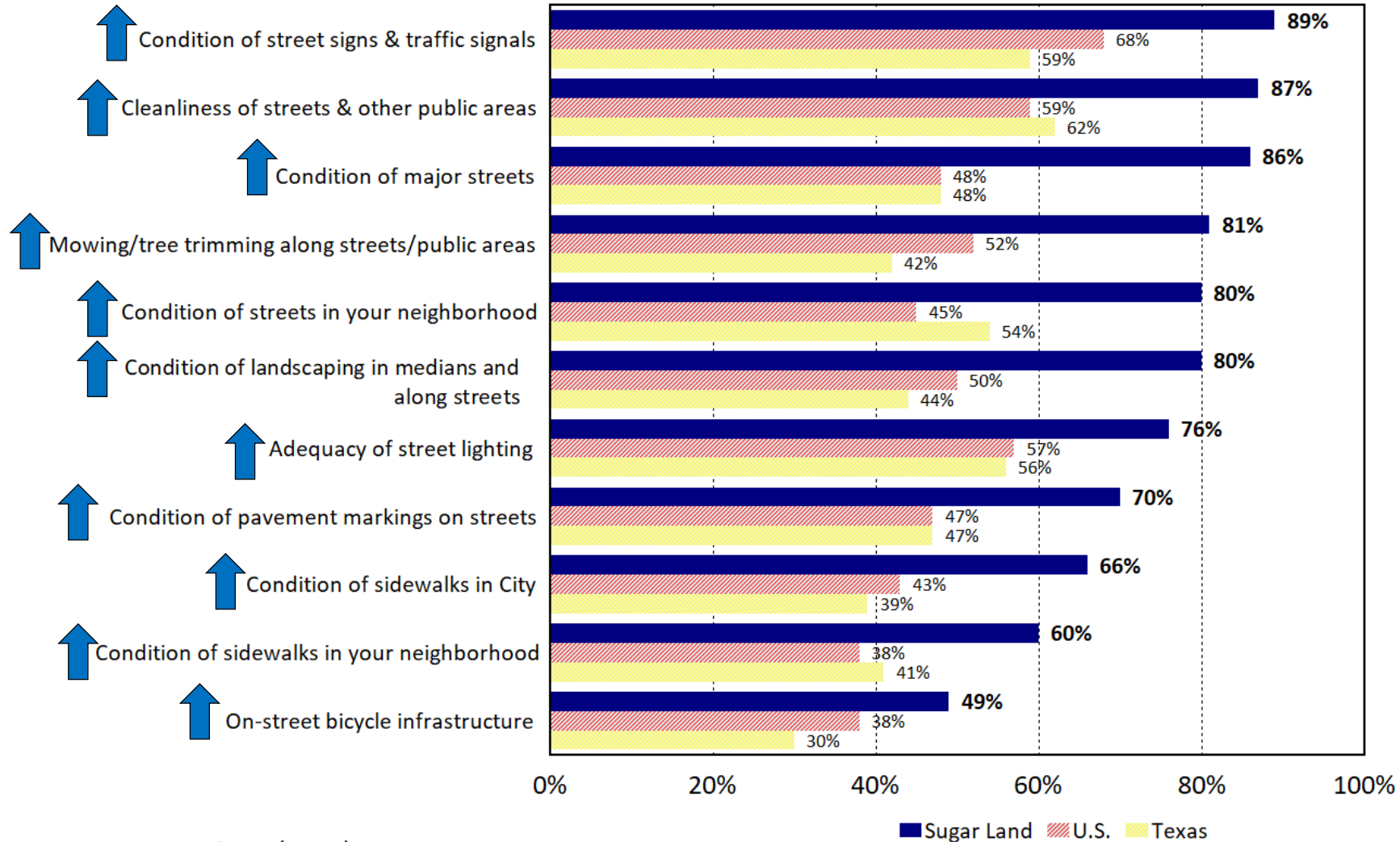
Source: ETC Institute (2020)

Sugar Land received the top rating in 1 of the areas assessed, but saw above average ratings in all 6

Public Works

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

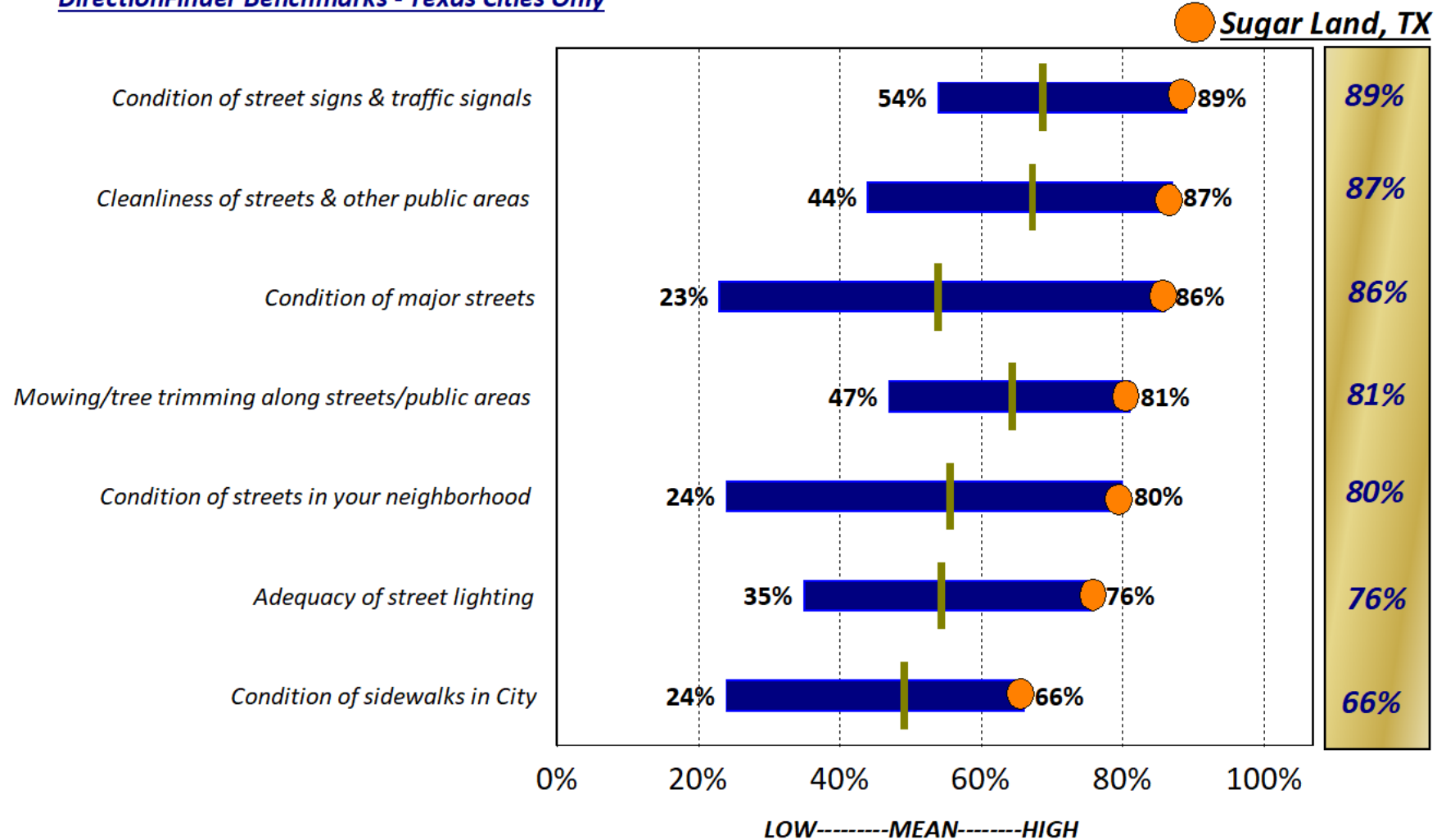
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Public Works

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



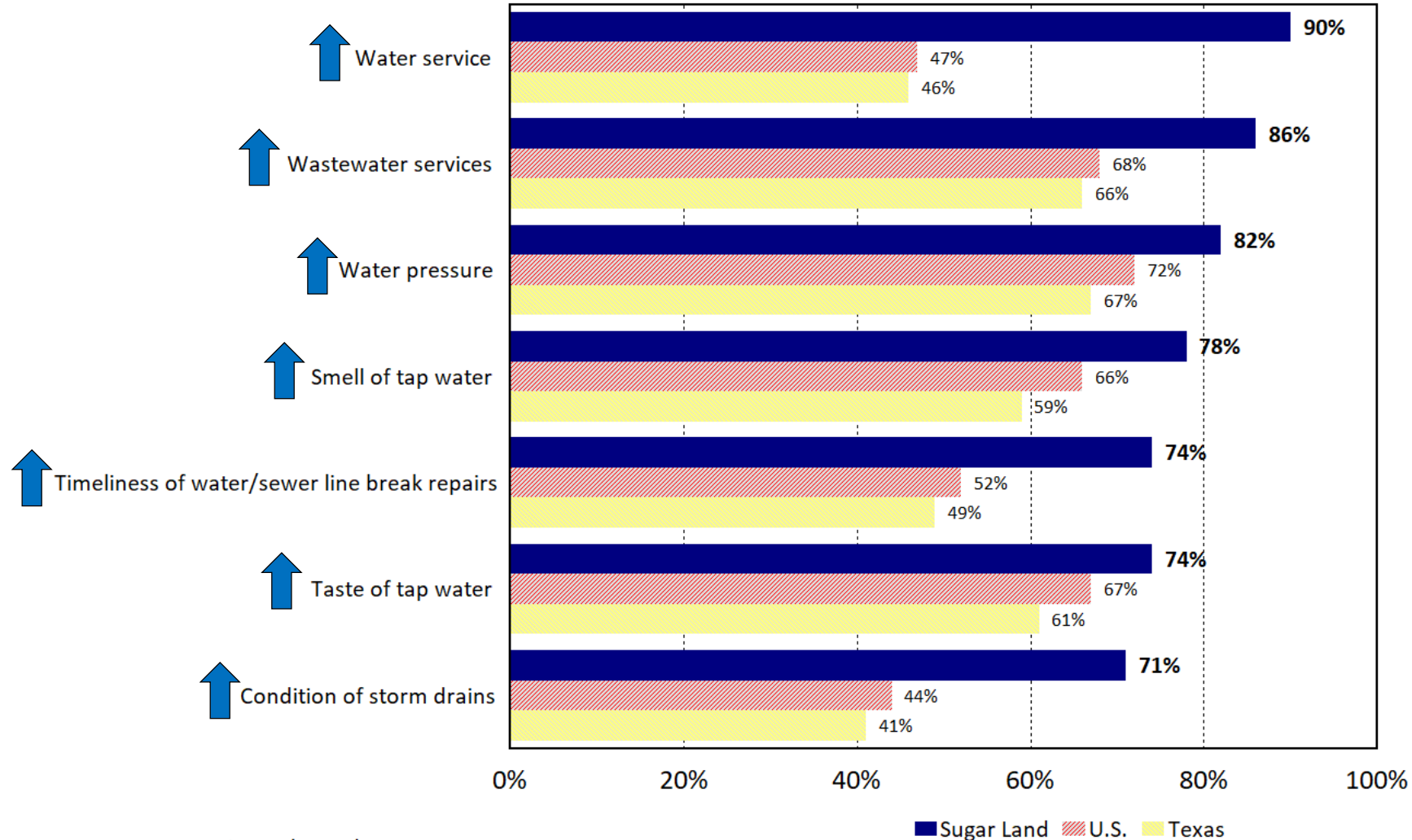
Source: ETC Institute (2020)

Sugar Land received the top rating in ALL 7 areas assessed

Utility Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

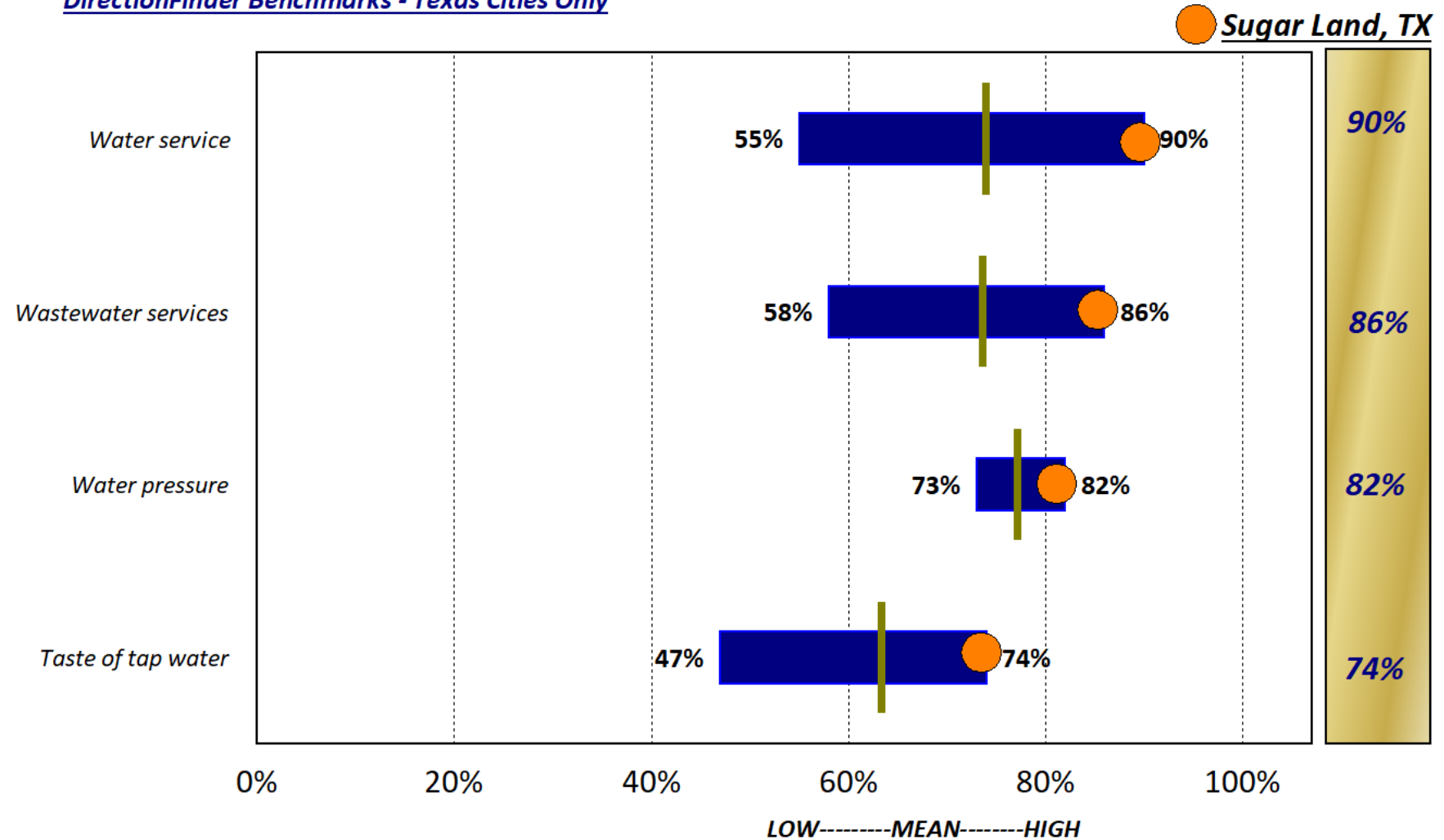
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Utility Services

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



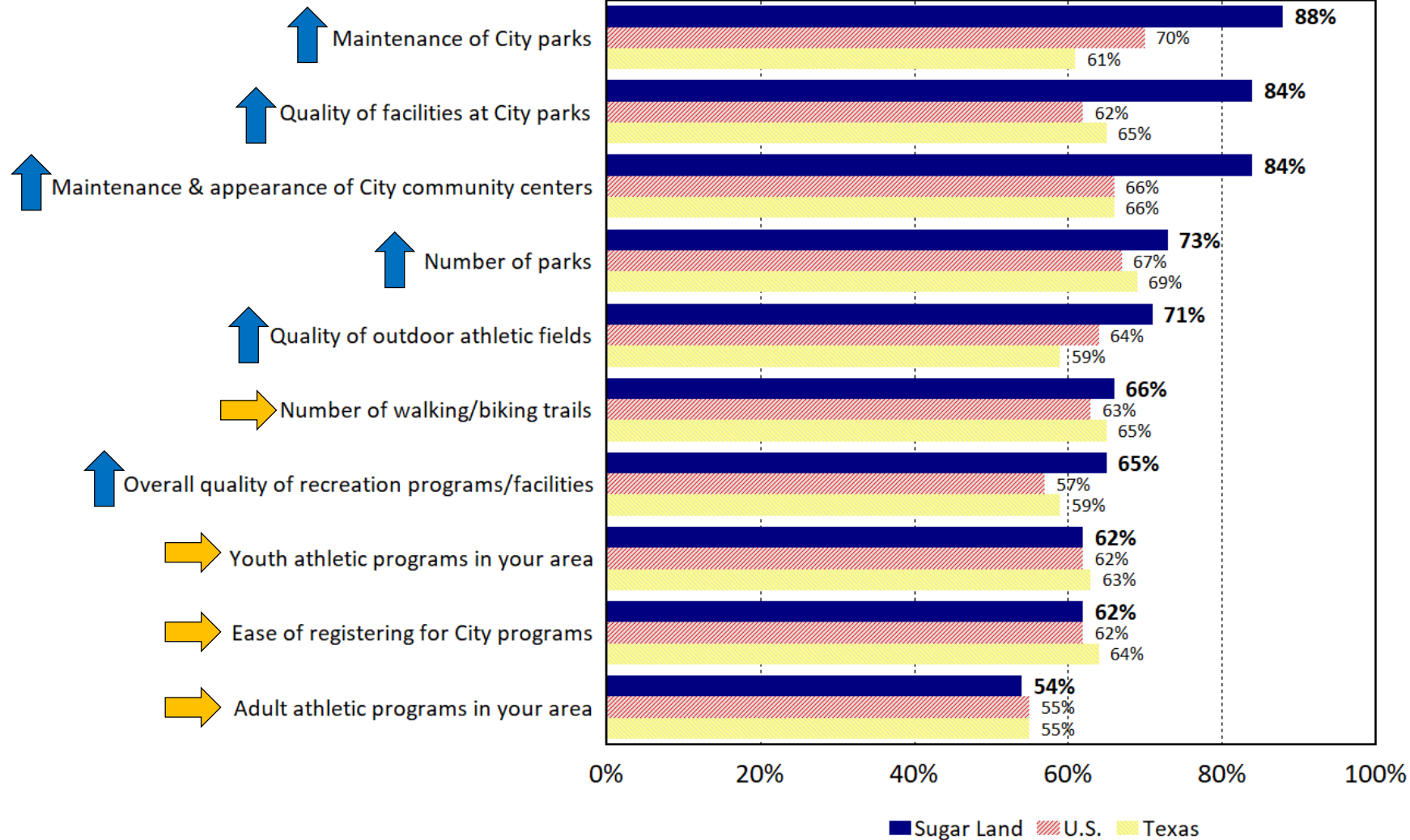
Source: ETC Institute (2020)

Sugar Land received the top rating in ALL 4 areas assessed

Parks and Recreation

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

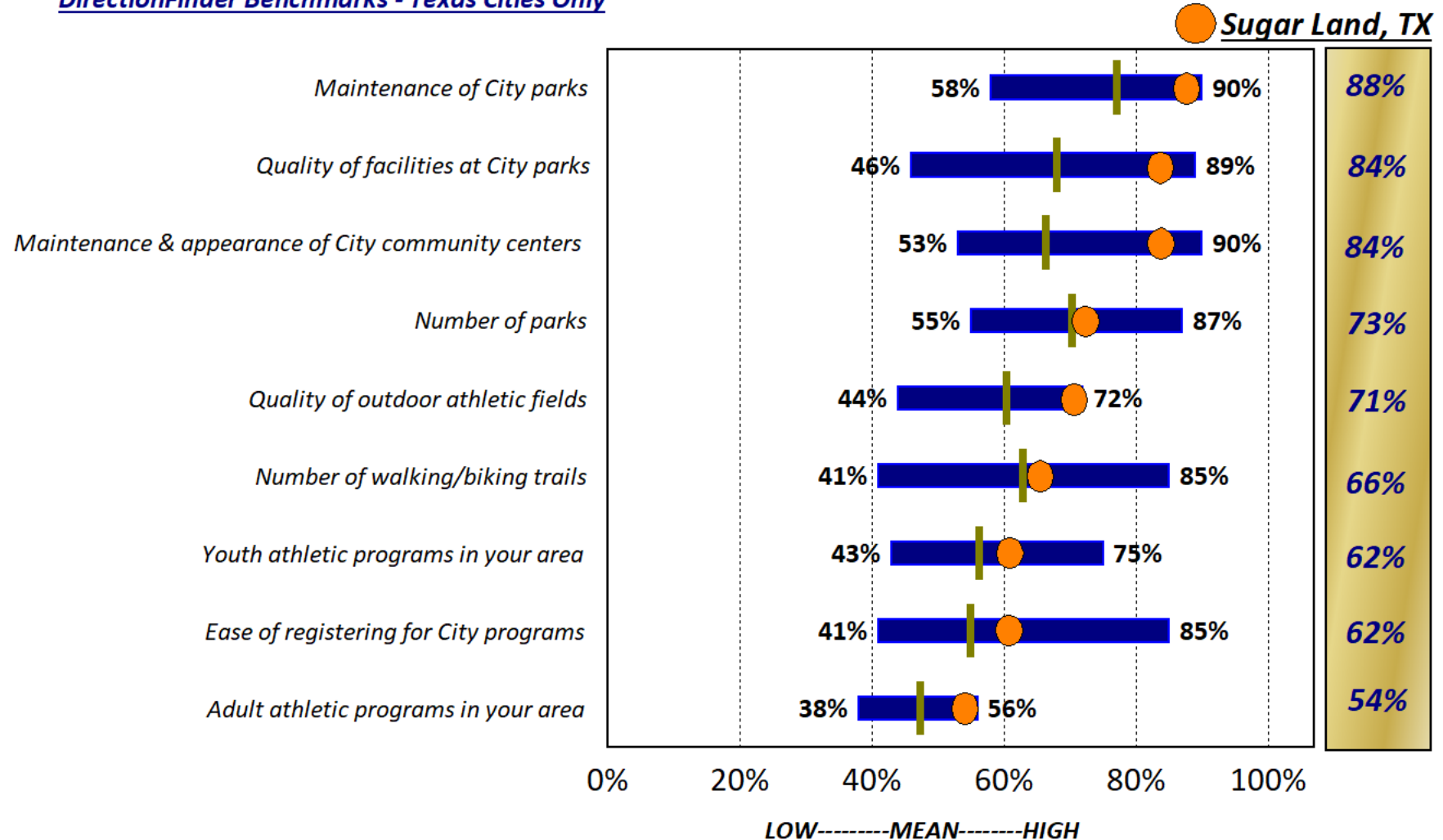
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Parks and Recreation

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



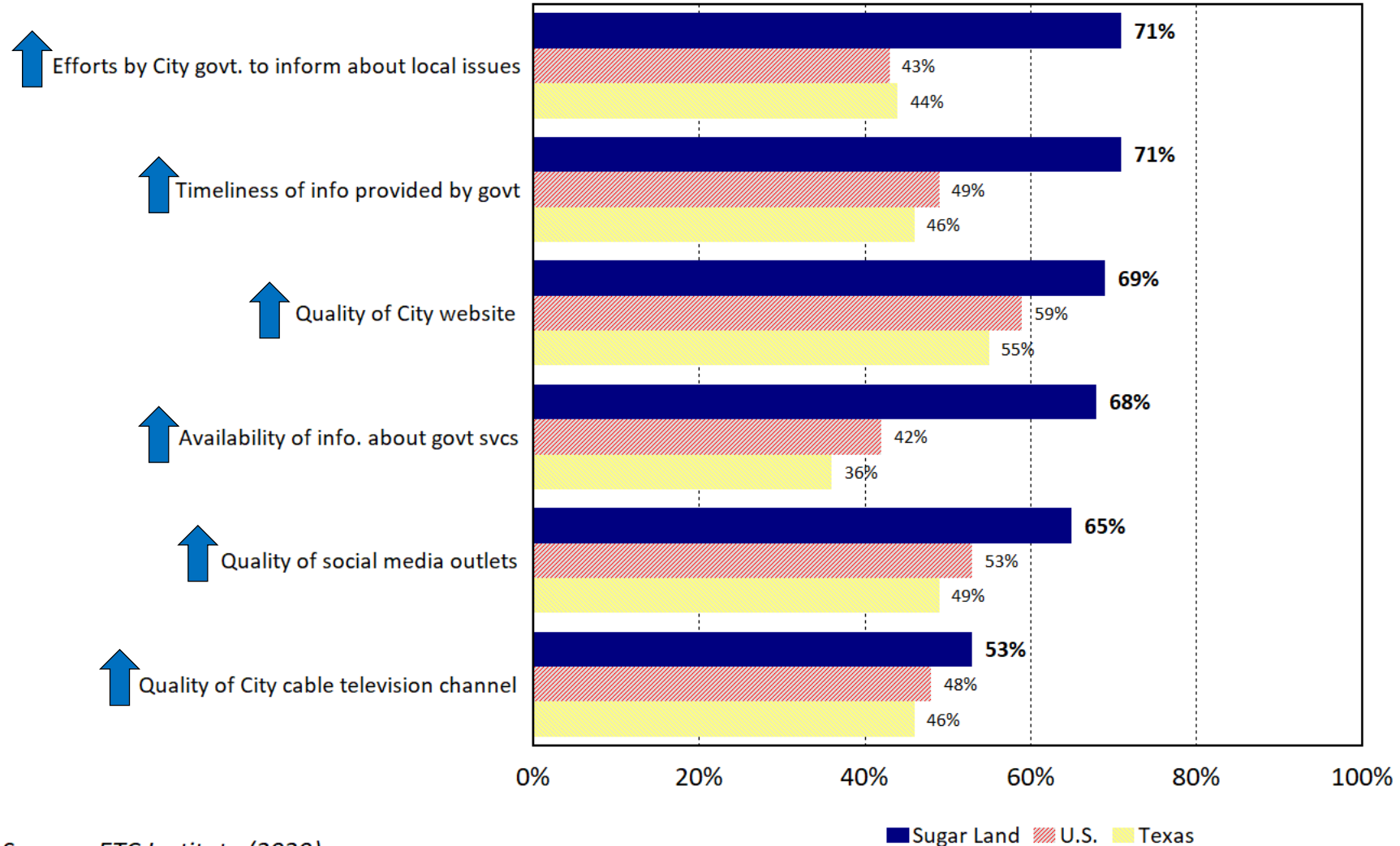
Source: ETC Institute (2020)

Sugar Land was above the average in all areas assessed

Public Information Services

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

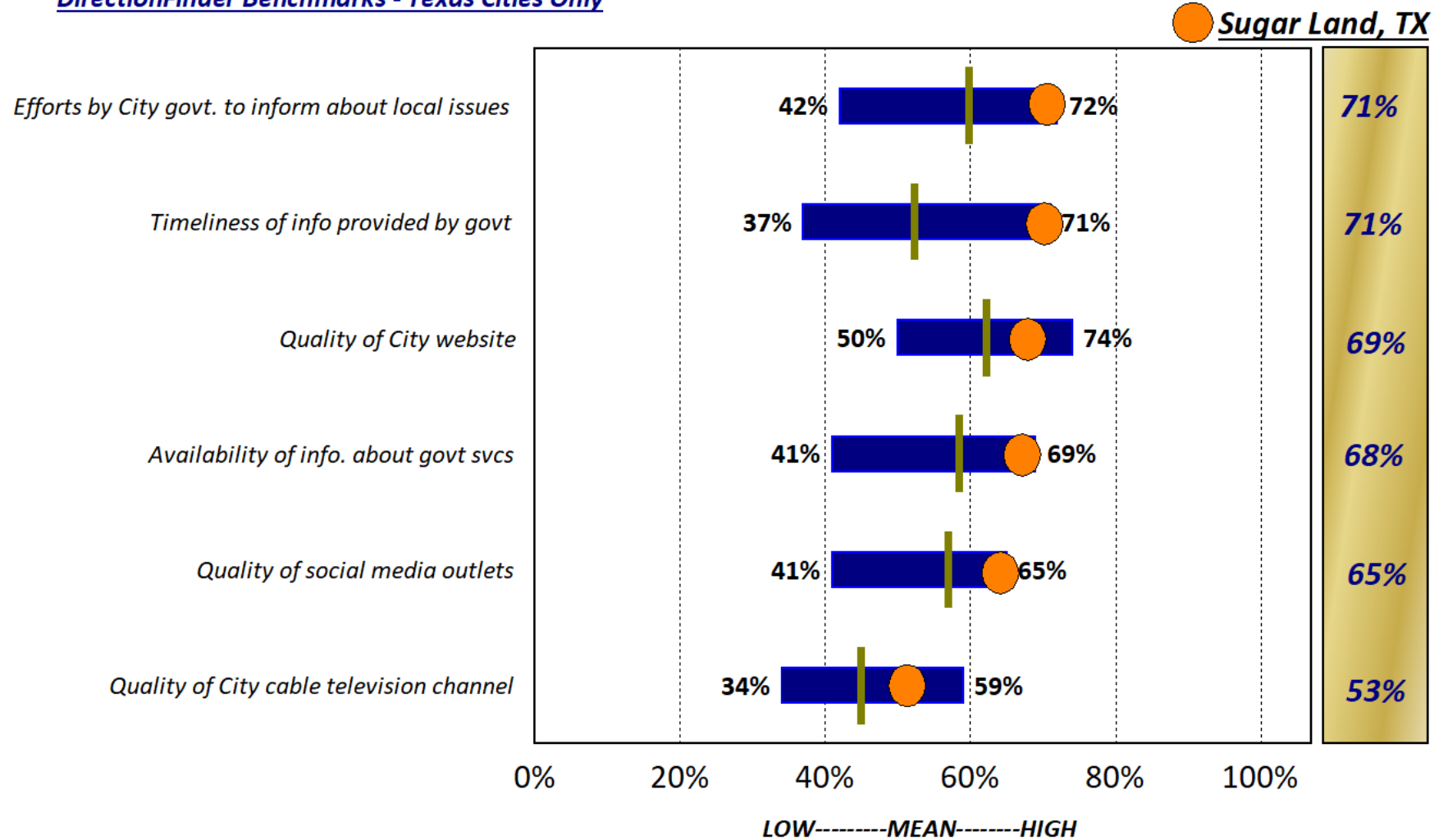
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Public Information Services

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



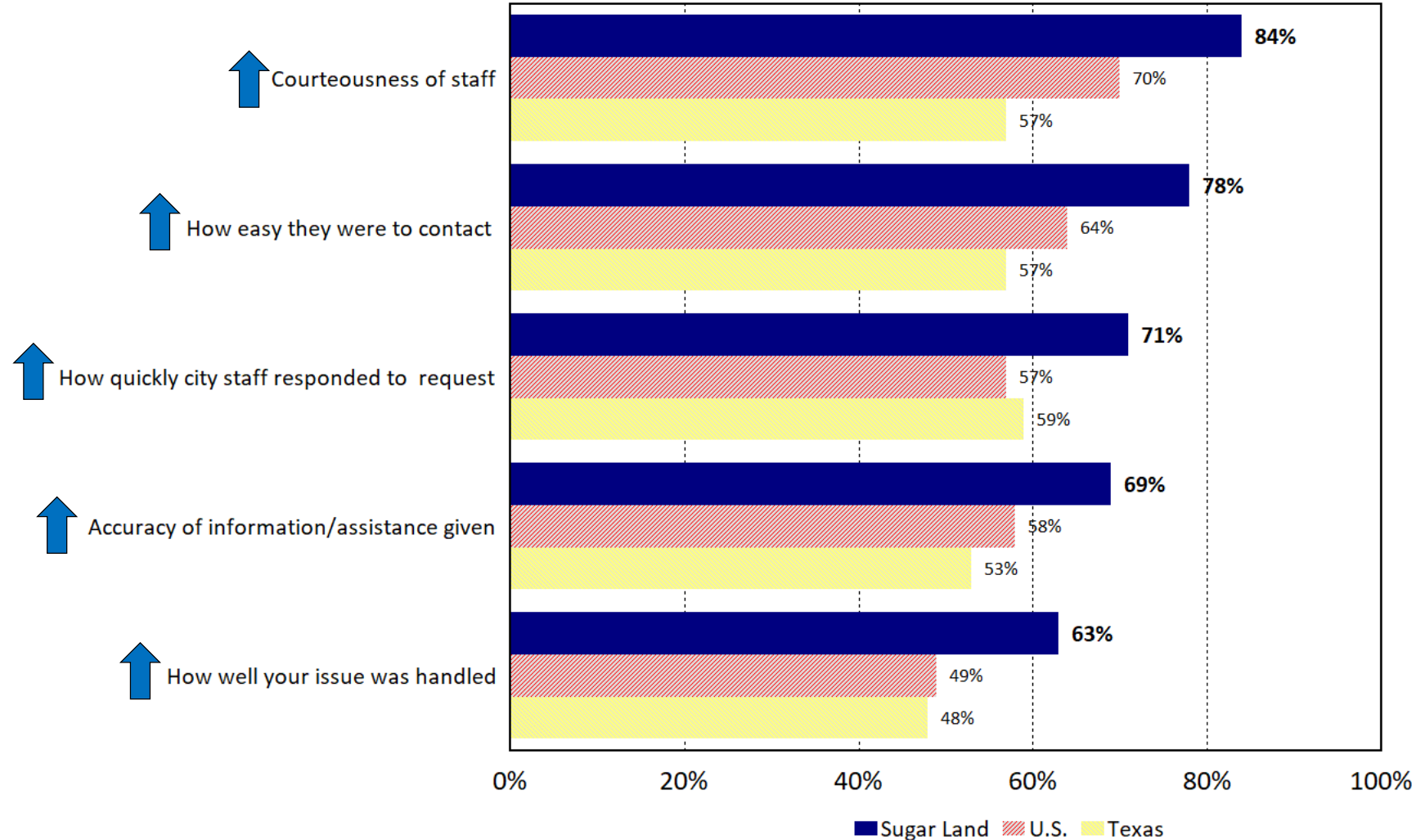
Source: ETC Institute (2020)

Sugar Land received the top rating in 3 of the 6 areas assessed

Customer Service

City of Sugar Land vs. U.S. vs. Texas

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"



Source: ETC Institute (2020)

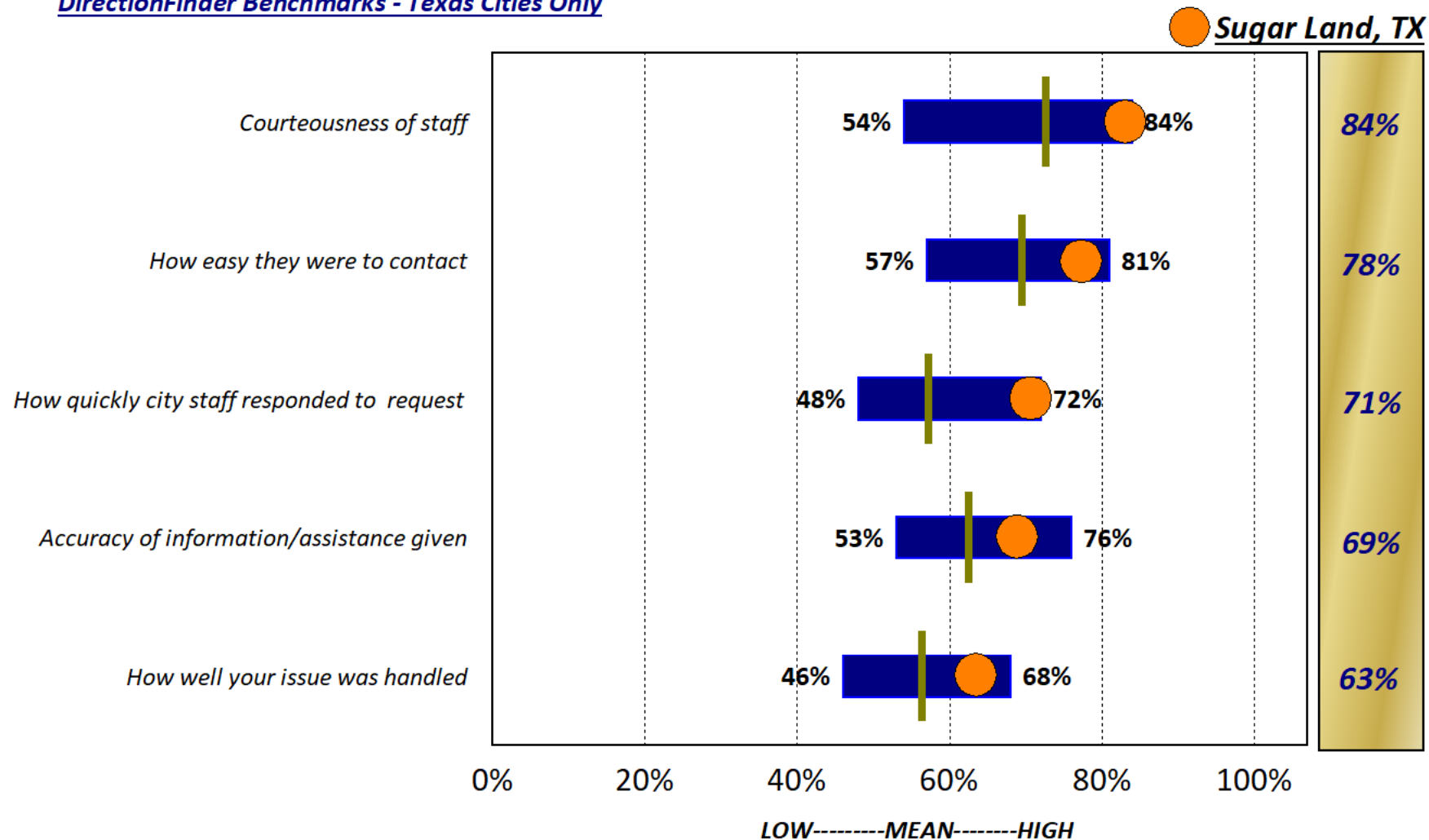
Significantly Higher Than Average: ↑

Significantly Lower Than Average: ↓

Customer Service

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale where 5 was "very satisfied"

DirectionFinder Benchmarks - Texas Cities Only



Source: ETC Institute (2020)

Sugar Land received the top rating in 1 of the areas assessed, but saw above average ratings in all 5

Trends

SHORT-AND LONG-TERM TREND ANALYSIS

Notable Short-Term Increases Since 2017

- Flow of traffic and congestion management
- Leadership of elected officials
- Household hazardous waste disposal service
- Fire education programs in your community
- Overall quality of ambulance/EMS
- Adequacy of street lighting
- Leadership of City manager
- The City as a place to retire
- Efforts to ensure the community is prepared for emergencies
- How quickly fire personnel respond
- Maintenance and appearance of community centers
- Ease of registering for City programs
- Smell of tap water
- Fire inspection programs
- How quickly ambulance/EMS respond
- Wastewater services

Notable Long-Term Increases Since 2015

- How well your issue was handled by City employees
- Flow of traffic and congestion management
- Household hazardous waste disposal service
- Leadership of City Manager
- Leadership of elected officials
- Taste of tap water
- Feeling of safety when walking in neighborhood after dark
- Effectiveness of communication by City government
- Adequacy of street lighting in Sugar Land
- The City as a place to retire

Notable Decreases 2017 and 2015

Notable Short-Term Decreases Since 2017

- Accuracy of information/assistance given
- Condition of sidewalks in your neighborhood
- Condition of street drainage

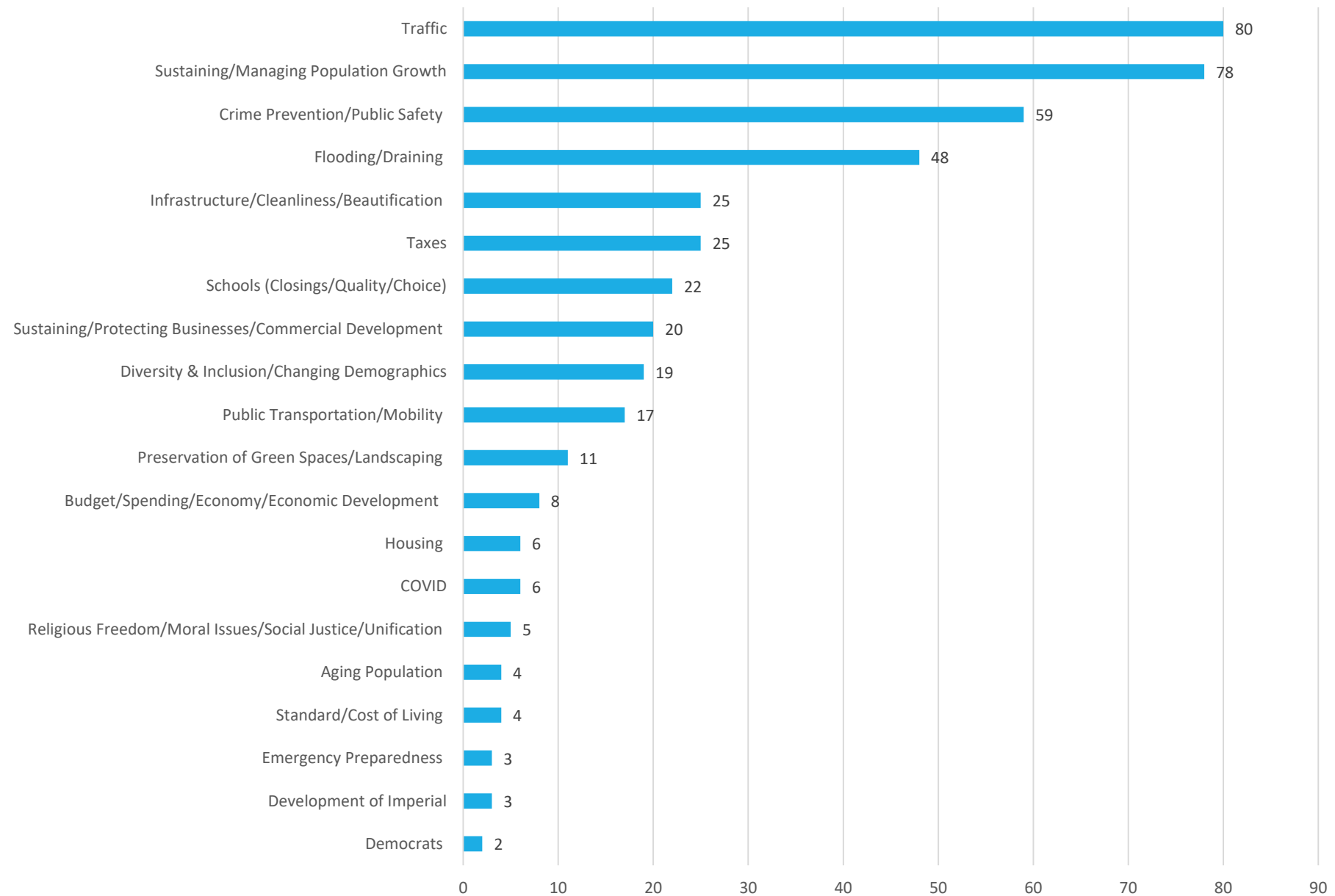
Notable Long-Term Decreases Since 2015

- Quality of City website
- Adult and youth athletic programs
- Enforcement of local codes and ordinances
- Police safety awareness education programs
- Senior citizen programs
- Condition of street drainage
- Visibility of police in commercial and retail areas

Priorities for Investment

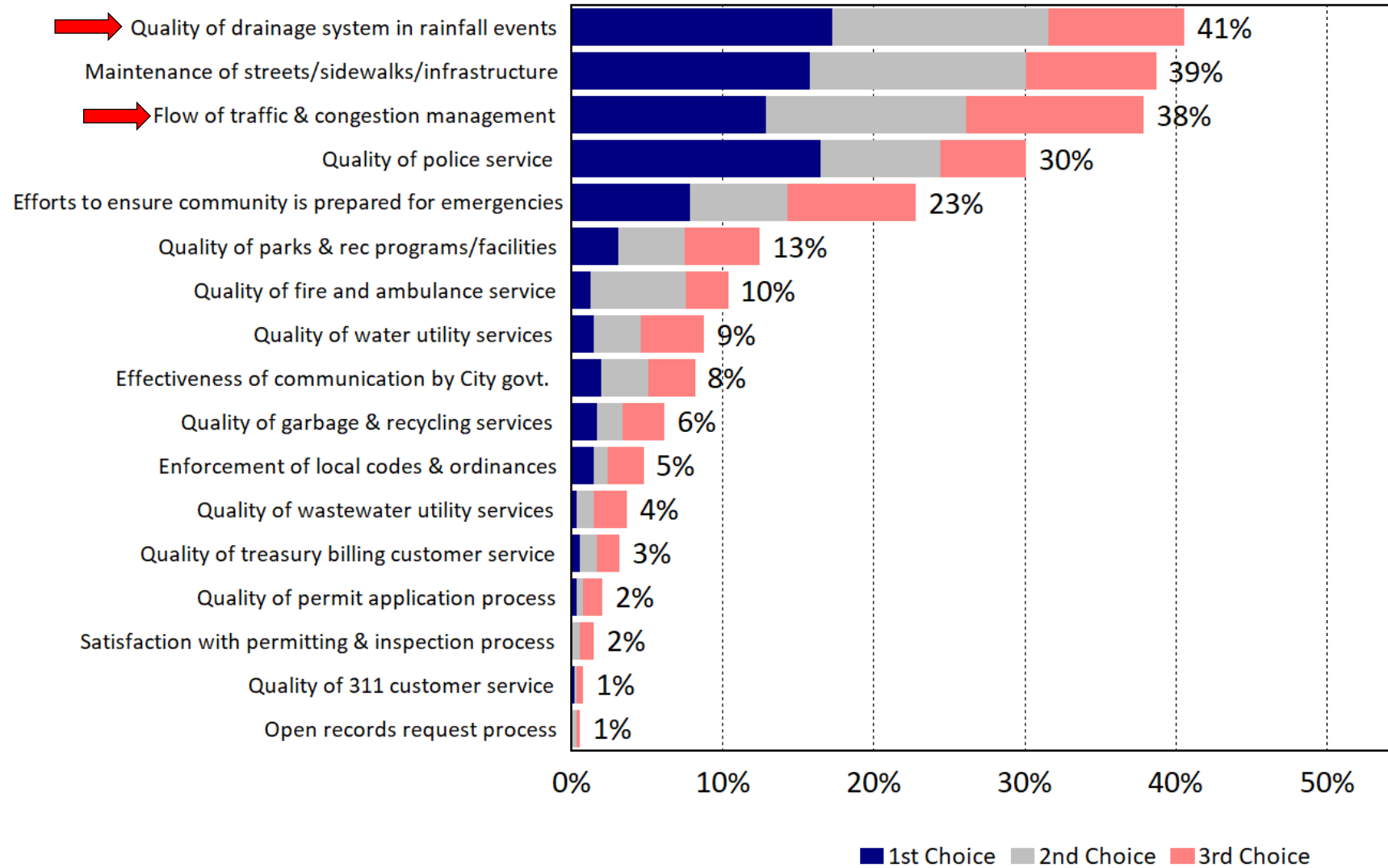
IMPORTANCE-SATISFACTION ANALYSIS

Q28. What do you think are the MOST SIGNIFICANT issues facing Sugar Land in the next 5 years?



Q3. THREE Major Categories of Service That Residents Think Should Receive the Most Emphasis Over the Next Two Years

by percentage of respondents who selected the item as one of their top three choices



Source: ETC Institute (2020)

2020 Importance-Satisfaction Rating

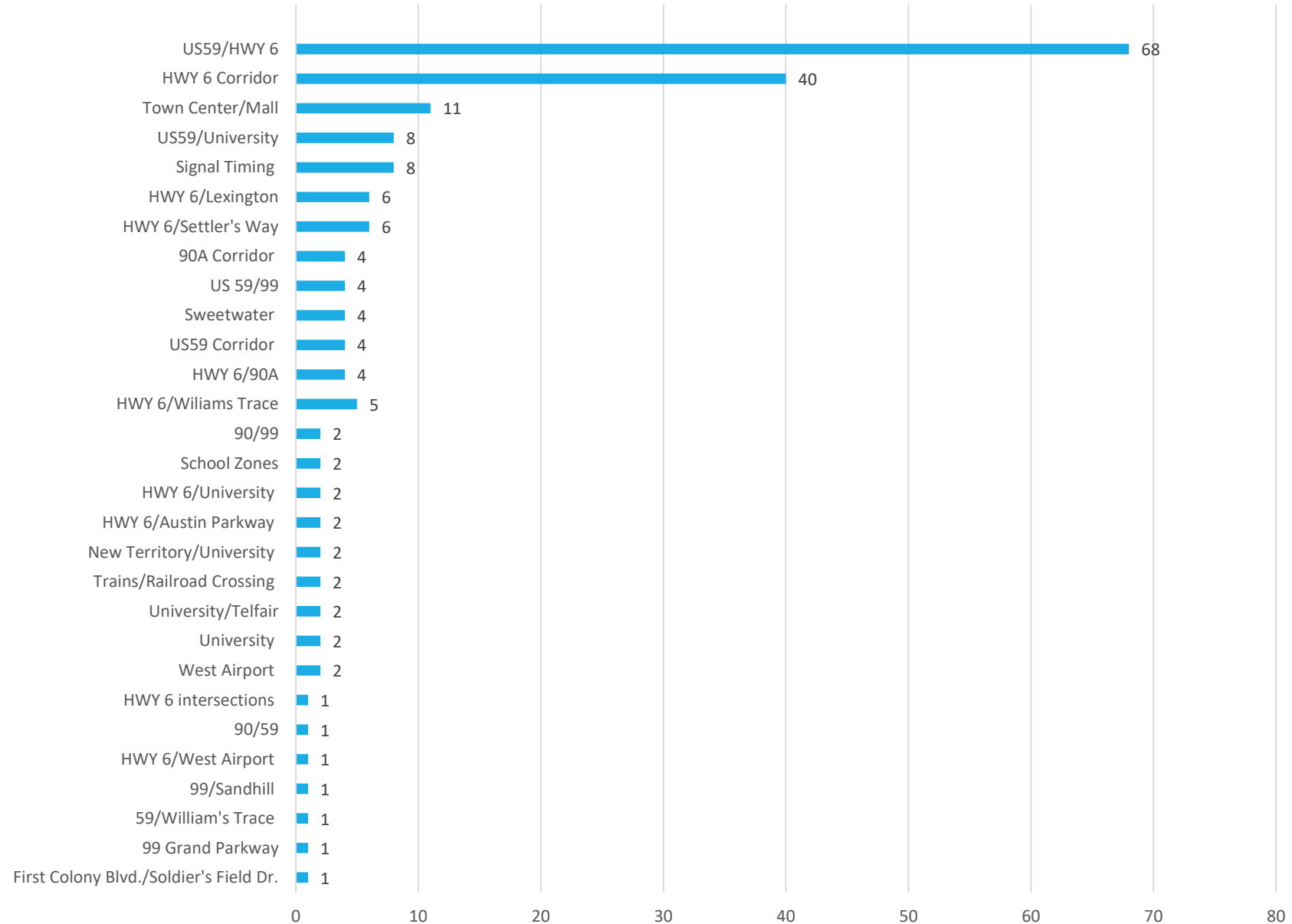
City of Sugar Land

Major Categories of City Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Quality of drainage system in rainfall events	41%	1	71%	13	0.1177	1
Flow of traffic & congestion management	38%	3	73%	12	0.1012	2
Maintenance of streets/sidewalks/infrastructure	39%	2	81%	9	0.0739	3
Efforts to ensure community is prepared for emergencies	23%	5	91%	3	0.0201	4
Quality of police service	30%	4	94%	2	0.0196	5
Quality of parks & rec programs/facilities	13%	6	87%	5	0.0160	6
Effectiveness of communication by City govt.	8%	9	82%	8	0.0151	7
Enforcement of local codes & ordinances	5%	11	71%	14	0.0140	8
Quality of water utility services	9%	8	86%	6	0.0120	9
Quality of permit application process	2%	14	61%	17	0.0081	10
Quality of treasury billing customer service	3%	13	76%	10	0.0077	11
Quality of garbage & recycling services	6%	10	90%	4	0.0062	12
Satisfaction with permitting & inspection process	2%	15	63%	16	0.0055	13
Quality of wastewater utility services	4%	12	86%	7	0.0051	14
Quality of fire and ambulance service	10%	7	96%	1	0.0037	15
Open records request process	1%	17	64%	15	0.0022	16
Quality of 311 customer service	1%	16	74%	11	0.0021	17

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

Q3a. Are there specific locations where traffic congestion is a concern?



2020 Importance-Satisfaction Rating

City of Sugar Land

Public Safety Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Visibility of police in neighborhoods	30%	1	78%	8	0.0644	1
Efforts by City government to prevent crime	26%	2	79%	7	0.0552	2
Visibility of police in commercial & retail areas	17%	5	77%	9	0.0380	3
Police safety awareness education programs	11%	7	70%	13	0.0332	4
How quickly police respond to emergencies	17%	4	85%	6	0.0257	5
Enforcement of City traffic laws	11%	6	77%	10	0.0253	6
Overall quality of City police protection	26%	3	92%	2	0.0198	7
Fire education programs in your community	7%	10	75%	11	0.0177	8
Parking enforcement services	4%	14	67%	14	0.0129	9
Fire inspection programs in your community	4%	13	71%	12	0.0118	10
How quickly ambulance/EMS personnel respond	7%	12	90%	5	0.0069	11
Quality of ambulance/emergency medical services	8%	9	91%	4	0.0068	12
Overall quality of fire services	10%	8	93%	1	0.0067	13
How quickly fire services personnel respond	7%	11	92%	3	0.0052	14

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

City of Sugar Land

Public Works and Utility Services

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Condition of sidewalks in your neighborhood	24%	2	60%	19	0.0954	1
Condition of street drainage	25%	1	65%	18	0.0880	2
On-street bicycle infrastructure (bike lanes/signs/sharrows)	16%	5	49%	20	0.0828	3
Condition of sidewalks in City	16%	4	65%	17	0.0571	4
Condition of storm drains	15%	6	71%	15	0.0438	5
Condition of major streets in Sugar Land	19%	3	86%	4	0.0261	6
Adequacy of street lighting in Sugar Land	11%	8	77%	11	0.0261	7
Condition of streets in your neighborhood	12%	7	80%	8	0.0240	8
Taste of tap water	8%	10	74%	13	0.0220	9
Accessibility of streets, sidewalks, & buildings for people with disabilities	7%	12	74%	14	0.0187	10
Condition of pavement markings on streets	5%	15	70%	16	0.0144	11
Cleanliness of streets & other public areas	9%	9	87%	3	0.0121	12
Mowing/tree trimming along streets/public areas	6%	13	80%	7	0.0112	13
Condition of landscaping or streetscaping in medians along streets	5%	14	80%	9	0.0106	14
Water service	8%	11	90%	1	0.0081	15
Water pressure	4%	16	81%	6	0.0077	16
Timeliness of water/sewer line break repairs	3%	18	74%	12	0.0075	17
Smell of tap water	3%	20	78%	10	0.0058	18
Condition of street signs & traffic signals	4%	17	88%	2	0.0045	19
Wastewater services	3%	19	86%	5	0.0041	20

I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

2020 Importance-Satisfaction Rating

City of Sugar Land

Parks and Recreation

Category of Service	Most Important %	Most Important Rank	Satisfaction %	Satisfaction Rank	Importance-Satisfaction Rating	I-S Rating Rank
Number of walking/biking trails	24%	2	66%	7	0.0818	1
Senior citizen programs	13%	5	55%	12	0.0584	2
Number of parks	15%	4	74%	4	0.0392	3
City-produced special events	11%	6	71%	5	0.0316	4
Adult athletic programs in your area	7%	9	55%	13	0.0309	5
Quality of facilities at City parks	20%	3	85%	2	0.0299	6
Maintenance of City parks	26%	1	89%	1	0.0296	7
Overall quality of recreation programs/facilities	8%	8	65%	9	0.0273	8
Youth athletic programs in your area	6%	10	63%	10	0.0228	9
Maintenance & appearance of City community centers	10%	7	84%	3	0.0159	10
Ease of registering for City programs	4%	13	62%	11	0.0150	11
T.E. Harman Center - Senior Adult Facility	4%	12	66%	8	0.0141	12
Quality of outdoor athletic fields	5%	11	70%	6	0.0135	13

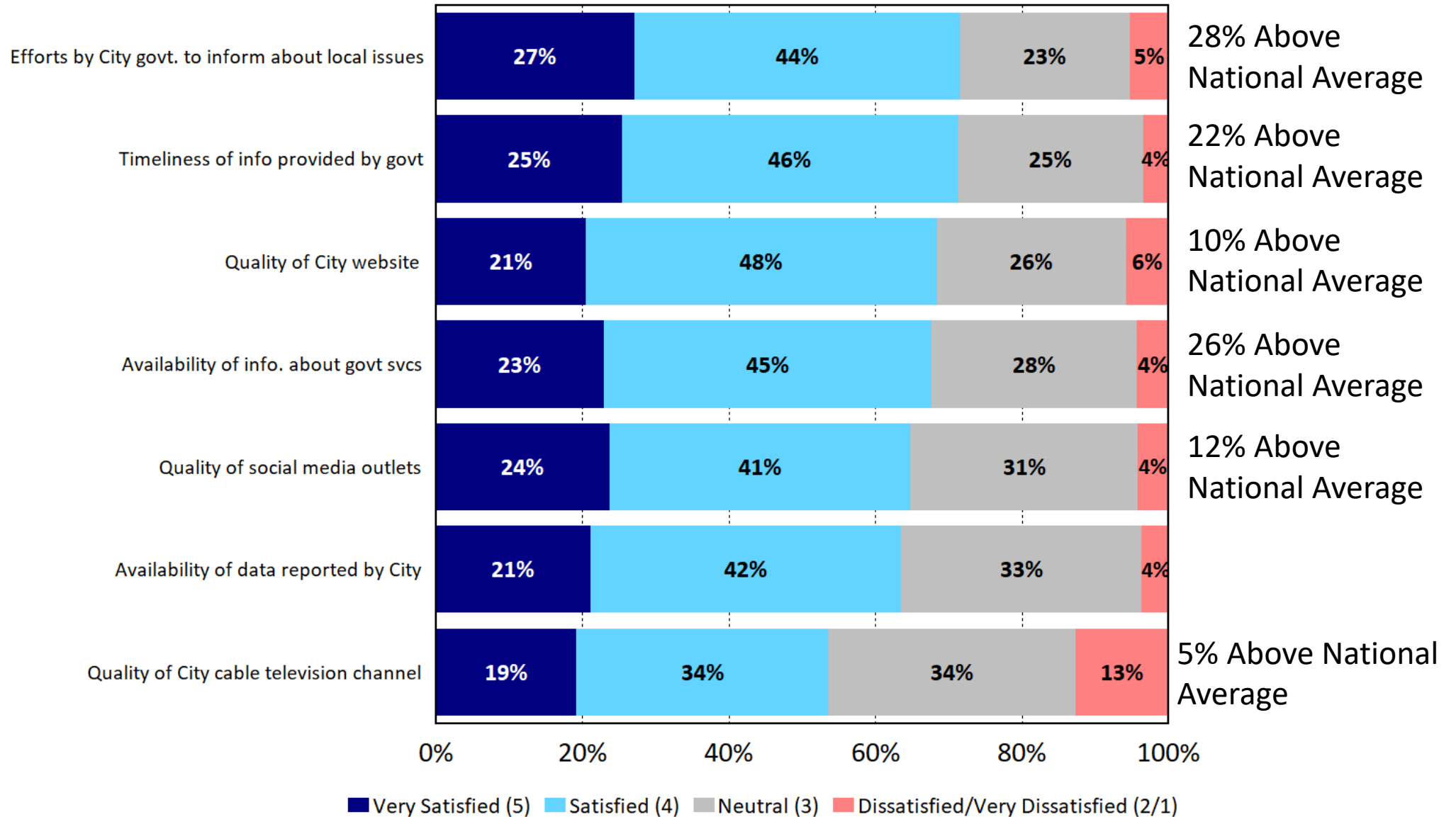
I-S Ratings .1000 or Greater Are Considered a High Priority for Investment Over the Next Two Years

Communication

THE CITY IS THE PRIMARY SOURCE OF INFORMATION FOR MOST
RESIDENTS

Q19. Overall Satisfaction with Public Information Services

by percentage of respondents (excluding “don’t know”)

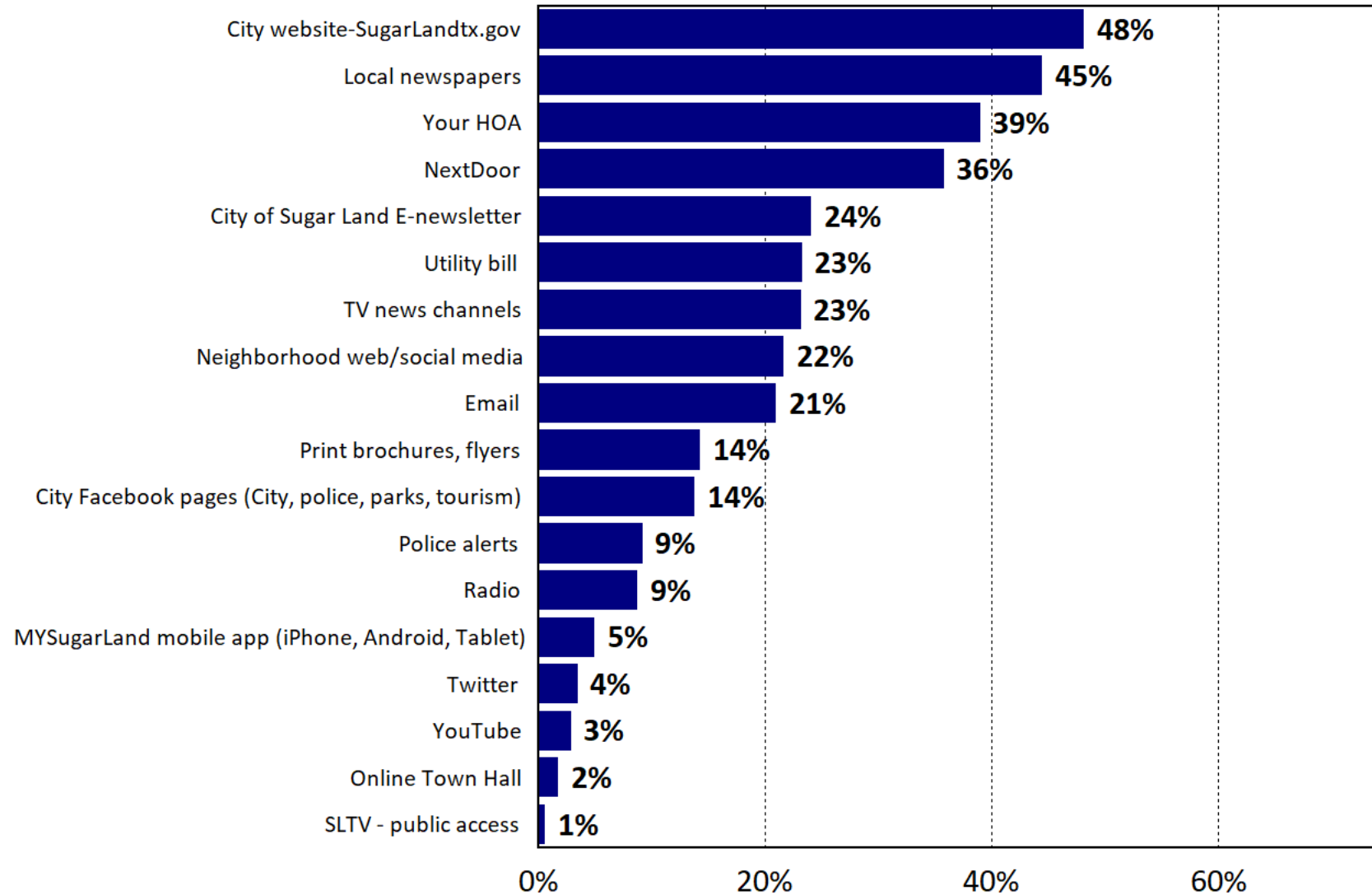


Source: ETC Institute (2020)

Overall, satisfaction with City communication is extremely high when compared to the National Average

Q20. From which of the following sources do you currently get information about the City of Sugar Land?

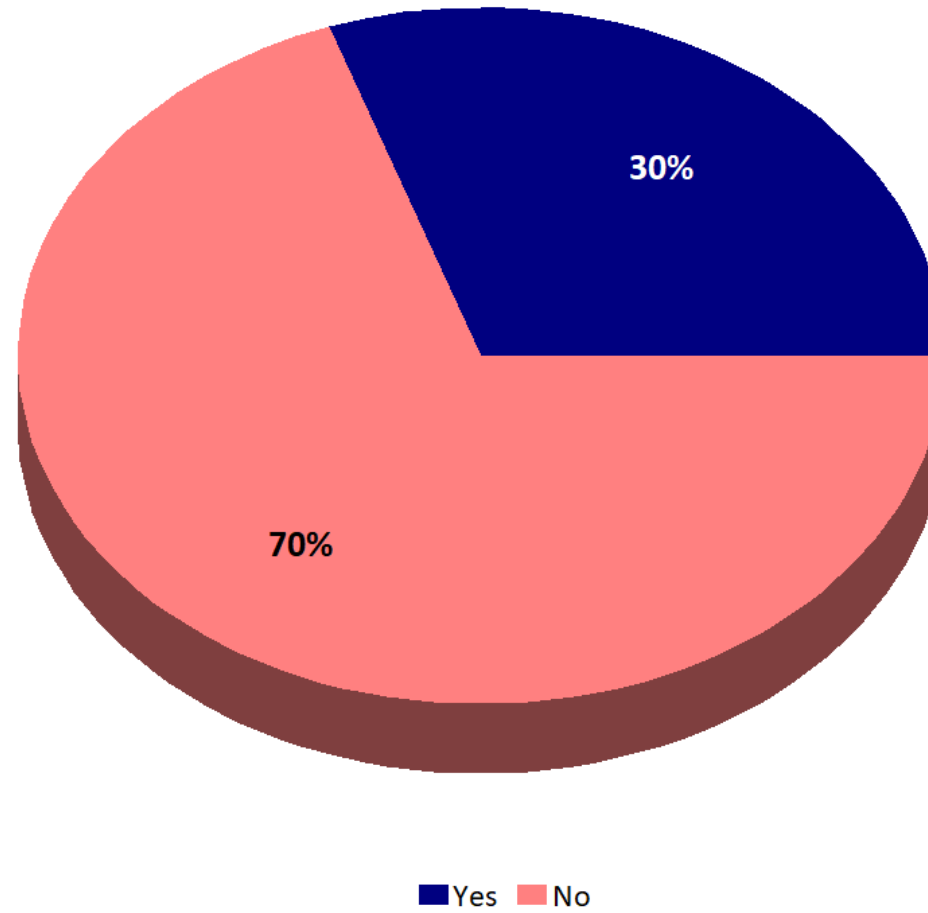
by percentage of respondents



Source: ETC Institute (2020)

Q21. Are you aware of the City's social media channels?

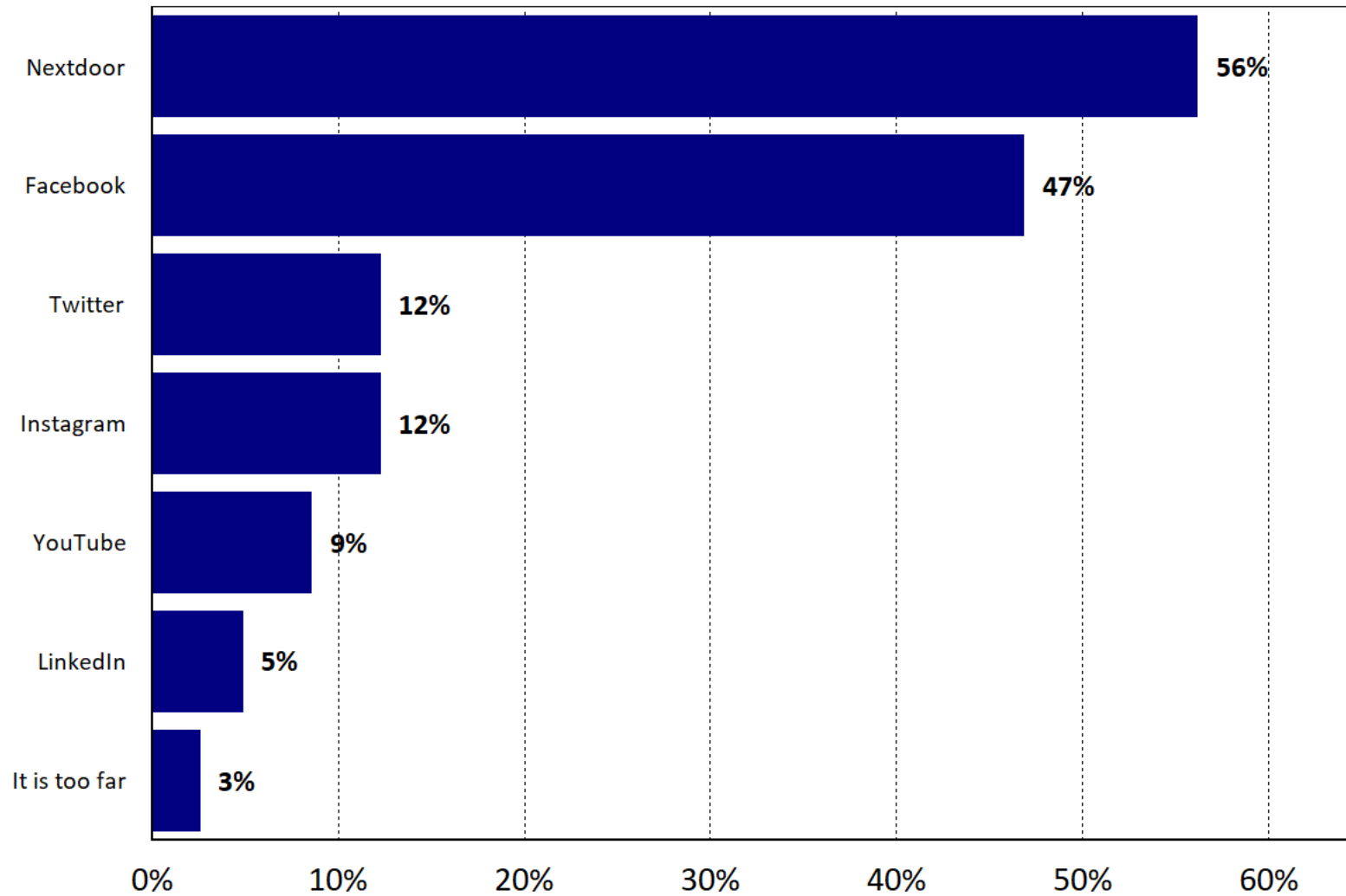
by percentage of respondents (excluding "not provided")



Source: ETC Institute (2020)

Q21a. On which of the following social media outlets do you follow the City of Sugar Land?

by percentage of respondents who are aware of the City's social media channels (multiple selections could be made)



Source: ETC Institute (2020)

Summary

Residents Have a Positive Perception of the City

- 98% rated the City as an “excellent” or “good” place to live
- 97% rated the City as an “excellent” or “good” place to raise children

Sugar Land Continues to Set the Standard for the Delivery of City Services

- The City rated the same as or above the Texas Average in 77 of the 80 areas (96%) that were compared
- The City rated 40% over the Texas average for the value received for City taxes and fees
- The City rated 36% over the Texas average for the overall quality of City government services

Top Priorities for Improvement

- Quality of drainage system in rainfall events
- Flow of traffic and congestion management (same as 2017)

Next Steps

Share with city departments and offices for planning.

Publicize results

1. Social Media
2. Website
3. News Release
4. Video for SLTV and other platforms
5. HOA Distribution

Questions?

THANK YOU!